

# Exhibit A

## YORAM (JERRY) WIND

**Academic Positions:** Jerry Wind is The Lauder Professor and Professor of Marketing at The Wharton School of the University of Pennsylvania. He is the founding director of *The Wharton "think tank," The SEI Center for Advanced Studies in Management*. The Center's mission is to assure through research and development the quality, relevance and impact of management research, education and practice. Dr. Wind joined the Wharton faculty in January 1967, upon receipt of his doctorate from Stanford University.

**Program Development:** Dr. Wind is the founder and academic director of *The Wharton Fellows* program. From 1983 to 1988, he was the founding director of *The Joseph H. Lauder Institute of Management and International Studies*, and from 1980 to 1983 the founding director of *The Wharton Center for International Management Studies*. Dr. Wind chaired the Wharton committees that designed *The Wharton Executive MBA Program* (1974), *the new MBA curriculum* (1991), the School's *globalization strategy* (1995-1997), and the MBA's cross-functional integration efforts (2002-04). He also started *The Wharton International Forum* (1987) and served as the chairman of its faculty council until 1998. He was instrumental in establishing the Alfred West, Jr. Learning Lab and served as a member of its first advisory board (2001-05).

**Publications:** Dr. Wind is one of the most cited authors in marketing. He is a regular contributor to professional marketing literature, which has included 23 books and over 250 papers, articles, and monographs encompassing the areas of marketing strategy, marketing research, new product and market development, consumer and industrial buying behavior, and global marketing. His recent book, *Competing in a Flat World*, with Victor and William Fung, is due in September 2007. Dr. Wind's books have received wide acclaim and many have been translated into a number of languages. His most recognized recent publications include: *The Power of Impossible Thinking: How Changing Your Mental Models Will Transform the Business of Your Life and the Life of Your Business*, with Colin Crook (Wharton School Publishing, 2004), *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer* with Vijay Mahajan (Financial Times/Prentice Hall 2002), *Leveraging Japan: Marketing to the New Asia* with George Fields and Hotaka Katahira (Jossey-Bass 1999) and *Driving Change* with Jeremy Main (Free Press, 1998). Both *The Power of Impossible Thinking* and *Convergence Marketing* were selected by Executive Book Summaries as one of the thirty best business books of 2002 and 2004. His recent edited books—*New Product Diffusion Models* (Kluwer 2000), *Digital Marketing* (Wiley 2001), and *Marketing Research and Modeling: Progress and Prospects* (Kluwer 2004)—include the works of the leading experts on these topics.

**Editorship:** Dr. Wind is the founding editor of *Wharton School Publishing* (Wharton's J.V. with Pearson) (2003). He has served as editor-in-chief of the *Journal of Marketing*, on the policy boards of the *Journal of Consumer Research* and *Marketing Science*, and has been on the editorial boards of the major marketing journals. He has served as guest editor of special issues of the major marketing journals including *Marketing Science* (1996) on Empirical Generalization in Marketing (with Frank Bass), *JMR* (1997) on Innovation in New Product Development: Best Practice in Research, Modeling, and Applications, and *Marketing Research* (1998) on The State of the Art in Quantitative Research.

**Business Experience:** Dr. Wind has served as an advisor to many Fortune 500 firms and a number of non-U.S. multinationals in the financial services, pharmaceuticals, information, and consumer packaged goods industries. His consulting focuses on both overall global corporate and business strategy and transformation as well as marketing strategy and especially the development of new businesses. He is a regular advisor to the investment firm SEI. In addition, he has served as an expert witness in various legal cases. Dr. Wind is a member of the board of IDT, and a member of the advisory board of a number of start-ups including Mutual Arts and NetXentry (web for phone). He is a former director of Enhance Financial Services Corporation, Contel Corporation, CASA and a number of entrepreneurial ventures.

**Professional Activities:** Dr. Wind is an active member of the major marketing and management science professional associations. He is the former Chancellor of the International Academy of Management (IAM). He is a former academic trustee of the Marketing Science Institute and former chairman of the College of Marketing of the Institute of Management Science. He is one of the founders of an Israeli university—*The Interdisciplinary Center Herzliya* (IDC) (1994)—chairman of its academic council, and member of its academic appointment and promotion committee. He is also a member of the board of the American Friends of IDC. He is a member of the board of a number of Wharton's centers, including the Lauder Institute, a trustee of *The Philadelphia Museum of Art* and chair of its audience building committee, and a member of the Advisory Board of *Business for Diplomatic Action*. He is a frequent lecturer in faculty seminars and executive programs in over 50 universities worldwide.

**Awards:** Dr. Wind is the recipient of various awards, including the four major marketing awards—The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996) and the Buck Weaver Award (2007). He is the recipient of the first Faculty Impact Award given by Wharton Alumni (1993). In 1984, he was elected as member of the Attitude Research Hall of Fame and has won a number of research awards, including two Alpha Kappa Psi Foundation awards and a recent inclusion in JAR Classics issue of one of 18 articles that have withstood the test of time. In 2001 he was selected as one of the 10 *Grand Auteurs in Marketing* and later named as the 2003 recipient of the Elsevier Science Distinguished Scholar award of the Society for Marketing Advances. In May 2004 he was awarded as Honorary Fellow of the Decade by the Interdisciplinary Center Herzliya (Israel).

## ACADEMIC EXPERIENCE

### EDUCATION

Stanford University, Graduate School of Business. Ph.D. (Marketing), September 1964-December 1966.

Stanford University, International Center for Advancement of Management Education, Certificate in Marketing Management. September 1963-June 1964.

The Hebrew University, Jerusalem, School of Economics and Social Sciences, M.A. (Business Administration and Political Science), September 1961-June 1963; B. Soc. Sci. (Economics and Political Science), September 1958-June 1961.

### UNIVERSITY POSITIONS

#### A. University of Pennsylvania, The Wharton School

##### Faculty Positions:

The Lauder Professor, 1983-  
Professor of Marketing, 1973-

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Associate Professor of Marketing, 1970-1973

Assistant Professor of Marketing and International Business, 1967-1970

##### Selected Administrative Positions:

Founding Editor, Wharton School Publishing (WSP), 2003-

Founding Academic Director, The Wharton Fellows platform and program, 2000-

Founding Director, The SEI Center for Advanced Studies in Management, 1988-

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Founding Director, The Joseph H. Lauder Institute of Management and International Studies, 1983-1988

Founding Director, the 1st Title VI National Resource Center in International Management Studies, 1985-1988

Founding Director, The Wharton Center for International Management Studies, 1980-1983

##### Secondary Faculty Appointments:

Member of the Graduate Group in International Studies (School of Arts & Sciences), 1984-1998

Member of the OR Group, 1979-1984 and the OR affiliated faculty, 1984-1989

Senior Fellow of the Leonard Davis Institute, 1977-1980

Secondary Appointment as Professor of Management, 1981-1984

Member of the Extended Faculty of the Social Systems Sciences Dept. 1981-1986

#### B. Other Universities

The Interdisciplinary Center (IDC) Herzliya Israel, Co-Founder (for specific activities since 1994, see p. 43).

University of Tokyo (Japan) Co-Director of the Marunouchi Global Center (MCG) program, 2002; The First Hakuhodo Visiting Professorship, Spring 1992 and 1993.

Erasmus University (The Netherlands) The First Visiting Unilever-Erasmus Professorship, Spring 1993.

University of New South Wales (Australia) The First Visiting Hoover Foundation Professor, 1977.

University of California at Berkeley, School of Business Administration Visiting Professor, Fall 1975.

University of Tel Aviv, The Leon Recanati Graduate School of Business Administration,  
Visiting Senior Lecturer, September 1968-August 1969.

Stanford University, Graduate School of Business, Research Assistant, June 1965-October 1966.

The Hebrew University Jerusalem, Teaching Assistant in the Departments of Political Science and Business Administration, September 1961-June 1963.

## PUBLICATIONS

### I. BOOKS

1. *\*Competing in a Flat World Building Enterprises for a Borderless World* with Victor Fung and William Fung, Upper Saddle River, NJ: Wharton School Publishing, forthcoming.
2. *\*The Power of Impossible Thinking: How Changing Your Mental Models Will Transform the Business of Your Life and the Life of Your Business*, with Colin Crook [and Robert Gunther], Wharton School Publishing, 2004, selected by Executive Book Summaries as one of the thirty best business books of 2004. [Translated editions: Arabic; Bahasa Indonesia; Bulgarian; Chinese (simplified and traditional); English (Singapore); Italian; Japanese; Korean; Polish; Portuguese; Russian; Serbian; Spanish; Thai and Turkish.] Selected by Executive Book Summaries as one of the thirty best business books of 2004; finalist in *Fast Company* Reader's Choice Award for the October book of the month; among CEO READ top 25 books of August 2004. A paperback edition was published in 2006.
3. *Adventures in Conjoint Analysis: A Practitioners Guide to Trade-Off Modeling and Applications*, with Abba Krieger and Paul E. Green, 2004 – e-book available at [http://marketing.wharton.upenn.edu/people/faculty/green/green\\_monograph.cfm](http://marketing.wharton.upenn.edu/people/faculty/green/green_monograph.cfm).
4. *\*Convergence Marketing: Strategies for Reaching the New Hybrid Consumer*, with Vijay Mahajan [and Robert Gunther] (Prentice Hall/Financial Times), 2001. Selected by Executive Book Summaries as one of the thirty best business books of 2002. Translated editions: Chinese (simplified), Tsingua University Press; Chinese (traditional), Prentice Hall Taiwan; Bahasa (Indonesia); Spanish; Portuguese; Italian [*Consumatore Centauro: Orvaro il Marketing Della Convergenza*, ETAS LAB. IT. 2002]; Korean; and Japanese.
5. *Leveraging Japan: Marketing to the New Asia*, with George Fields and Hotaka Katahira (San Francisco: Josse Bass), 1999. Translated Japanese edition by Pearson Education, Japan, 2000.
6. *\*Driving Change*, with Jeremy Main (New York: The Free Press), 1997. Translated editions in U.K. by Kogan (Page Ltd.), 1998; China by Shanghai Jiao (Tong University Press), 1999; Hungary by Veres István (Geomeédia Szakkönyvek), 2000. Adaptation to local condition: Brazil by Luiz Felipe Monteiro Jr. (IBMEC Qualitymark Editoria), 2002.
7. *The Silverlake Project*, with Roy A. Bauer, Emilio Collar, Victor Tang and Patrick R. Houston. (New York: Oxford University Press), January, 1992. Translated to Chinese, Huaxia Publishing, 2000.
8. *\*Product Policy: Concepts, Methods and Strategies* (Reading, MA: Addison-Wesley), 1982. Reviewed *Journal of Marketing*, Summer 1981.
9. *\*Marketing and Product Planning* (in Spanish) (Mexico: Expansion). This book is based in part on sections from *Product Policy* which was selected by the editors of Expansion as the "Book of the Year" 1979.
10. *Multi-Attribute Decisions in Marketing: A Measurement Approach*, with Paul E. Green (and contributions by Douglas Carroll) (Hinsdale, IL: The Dryden Press), 1973.
11. *Organizational Buying Behavior*, with Frederick E. Webster, Jr. (Englewood Cliffs, NJ: Prentice Hall, Foundations of Marketing Series), 1972. Translated to Portuguese (Editor, Atlas, Sao Paulo, Brazil, 1975). Reviewed JMR, August 1974.
12. *Market Segmentation*, with Ronald E. Frank and William F. Massy (Englewood Cliffs, NJ: Prentice Hall, International Series in Management), 1972. Reviewed JMR, November 1972; August 1974.
13. *Advertising Measurement and Decision Making*, with Homer Dalby and Irwin Gross (Boston, MA: Allyn & Bacon), 1968.
14. *Industrial Buying and Creative Marketing*. Publication of the Marketing Science Institute (Boston, MA: Allyn & Bacon), 1967. Contributed two chapters; co-authored with Patrick J. Robinson three chapters; and participated in the overall organization and preparation of the book.



15. *Industrial Buying Behavior: Source Loyalty in the Purchase of Industrial Components*. Unpublished Ph.D. dissertation, Stanford University, December 1966.

## II. EDITED BOOKS

1. *\*Marketing Research and Modeling: Progress and Prospects*, A Tribute to Paul E. Green, with Paul E. Green (eds.). Boston: Kluwer, 2003.
2. *Digital Marketing*, with Vijay Mahajan, New York: Wiley, 2000. An e-book version is scheduled for 2001. Translated: Japanese by Pearson Education, Japan, 2001; and Italian by ETAS-RCS Libri, SPA. Italy, 2002.
3. *New Product Diffusion Models*, with Vijay Mahajan and Eitan Muller, Boston: Kluwer, International series in Quantitative Marketing, 2000.
4. *Innovation Diffusion Models of New Product Acceptance*, with Vijay Mahajan, The IC<sup>2</sup> Institute's Econometric & Management Sciences Series (Cambridge, MA: Ballinger Publishing Co.), 1986.
5. *New Product Forecasting: Models and Applications*, with Vijay Mahajan and Richard Cardozo. (Lexington, MA: Lexington Books), 1981.
6. *Advances in Organizational Buying Research: The Case of Acquisition of Scientific and Technical Information*, with Robert J. Thomas (Washington, D.C.: National Science Foundation), 1979.
7. *Moving Ahead with Attitude Research: Proceedings of the Seventh Attitude Research Conference*. Edited with Marshall Greenberg. (Chicago, IL: American Marketing Association), 1977. Designed, organized, and edited this book of eight invited position papers and eighteen application papers.
8. *Behavioral Models of Market Analysis: Foundations for Marketing Action*, edited with Francesco Nicosia (Hinsdale, IL: The Dryden Press), 1977.

## III. ARTICLES, CONTRIBUTED CHAPTERS, PAPERS IN PROCEEDINGS, AND WORKING PAPERS

The papers are grouped by the following topics:

- A. Portfolio analysis and strategy
- B. Marketing and business strategy
- C. Marketing and product strategy
- D. Research on industrial buying behavior
- E. Research on consumer behavior
- F. Marketing research and modeling
- G. International marketing
- H. International management education and the Lauder Institute
- I. Management practice and education in the 21st Century
- J. Convergence Marketing
- K. Mental Models – Power of Impossible Thinking
- L. Entries in Dictionaries and Encyclopedias

A number of papers can fit in more than one category. The division is, therefore, somewhat arbitrary and based primarily on the target audience of the paper.

### A. Portfolio Analysis and Strategy

1. Wind, Yoram. "Product Portfolio: A New Approach to the Product Mix Decision." Combined Proceedings. Ed. Ronald C. Curhan. Chicago: American Marketing Association, Aug. 1974. 460-464.
2. Wind, Yoram, and Henry J. Claycamp. "Planning Product Line Strategy: A Matrix Approach." Journal of Marketing 40 (Jan. 1976): 2-9.

- 3a. Wind, Yoram and Daniel Gross. "An Analytic Hierarchy Process for the Allocation of Resources Within a Target Product/Market/Distribution Portfolio." Proceedings of the First ORSA/TIMS Special Interest Conference on Market Measurement and Analysis. Eds. David B. Montgomery and Dick R. Wittink. Cambridge, MA: Marketing Science Institute, 1980. 278-297.
- 3b. Wind, Yoram, and Thomas L. Saaty. "Marketing Applications of the Analytic Hierarchy Process." Management Science 26.7 (July 1980): 641-658.
4. Wind, Yoram, and Vijay Mahajan. "Designing Product and Business Portfolios." Harvard Business Review 59.1 (Jan. - Feb. 1981): 155-165. Based on "Measurement Issues in Portfolio Analysis." Paper presented at the Second Market Measurement and Analysis Conference, Austin, TX, Mar. 1980.
5. Mahajan, Vijay, Yoram Wind, and John W. Bradford. "Stochastic Dominance Rules for Product Portfolio Analysis." TIMS Studies in the Management Sciences 18 (1982): 161-183.
6. Wind, Yoram, and Susan Douglas. "International Portfolio Analysis and Strategy: The Challenge of the 80s." Journal of International Business Studies (Fall 1981): 69-82.
7. Harshman, Richard A., Paul E. Green, Yoram Wind, and Margaret E. Lundy. "A Model for the Analysis of Asymmetric Data in Marketing Research." Marketing Science 1.2 (Spring 1982): 205-242.
8. Wind, Yoram, Vijay Mahajan, and Donald J. Swire. "An Empirical Comparison of Standardized Portfolio Models." Journal of Marketing 47 (Spring 1983): 89-99. Based on paper presented at the Conference on Analytical Approaches to Product and Marketing Planning, 1981.
9. Cardozo, Richard N., and Jerry Wind. "Risk Return Approach to Product Portfolio Strategy." Long Range Planning 18.2 (1985): 77-85.
10. Mahajan, Vijay, and Jerry Wind. "Integrating Financial Portfolio Analysis with Product Portfolio Models." Strategic Marketing and Management. Eds. H. Thomas and D. Gardner. New York: John Wiley & Sons Ltd., 1985: 193-212.
11. Wind, Yoram, and Vijay Mahajan. "Corporate Growth Through Synergy: Concept, Measurement & Applications." Wharton School Working Paper, Aug. 1985.
12. Mahajan, Vijay, and Yoram Wind. "Business Synergy Does Not Always Pay Off." Long Range Planning 21.1 (Feb. 1988): 59-65.

#### **B. Marketing and Business Strategy**

1. Wind, Yoram. "A Research Program for a Marketing Guided Approach to Mergers and Acquisitions." 1979 Educators' Conference Proceedings. Eds. Neil Beckwith, et al. Chicago: American Marketing Association, 1979. 207-256.
2. Wind, Yoram. "Marketing Oriented Strategic Planning Models." Marketing Decision Models. Eds. Randall L. Schultz and Andris A. Zoltners. New York: Elsevier, North Holland, Inc., 1981. 207-250.
3. Wind, Yoram. "Marketing and the Other Business Functions." Research in Marketing Vol. 5 (1981): 237-264.
4. Wind, Yoram. "Marketing and Corporate Strategy." The Wharton Magazine (Summer 1982): 38-45. Based on Wind, Yoram. "Marketing and Corporate Strategy: Problems and Perspectives." 13th Annual Albert Wesley Frey Lecture. University of Pittsburgh. 1981.
5. Robertson, Thomas S., and Yoram Wind. "Marketing Strategy." The Strategic Management Handbook. Ed. Kenneth J. Albert. New York: McGraw-Hill, 1983. 11-3-11-22.

- 6.] Wind, Yoram, and Thomas S. Robertson. "Marketing Strategy: New Directions for Theory and Research." Journal of Marketing 47 (Spring 1983): 12-25.
7. Dunn, Elizabeth F., and Jerry Wind. "Analytic Hierarchy Process for Generation and Evaluation of Marketing Mix Strategies." Contemporary Views on Marketing Practice. Eds. Gary L. Frazier and Jagdish N. Sheth. Lexington, MA: Lexington Books, Dec. 1987. 111-131.
8. Wind, Yoram (Jerry). "Marketing for Top Executives: Problems and Prospects," Wharton School Working Paper, 1985.
9. Wind, Yoram. "Models for Marketing Planning and Decision Making." Handbook of Modern Marketing. 2nd ed. Ed. Victor P. Buell. New York: McGraw-Hill, Feb. 1986. 49-1-49-12.
10. Wind, Jerry. "Expanding the Role of the Board of Directors." Wharton School Working Paper, May 1986.
11. Wind, Jerry. "A Marketing Perspective for Competitive Strategy." Handbook of Business Strategy: 1988/1989 Yearbook. Ed. Harold E. Glass. Boston: Warren, Gorham & Lamont, 1988. 17-1-17-25. Based on paper presented at the International Conference on Competitive Analysis, Groningen, Netherlands, Oct. 1986.
- 12.] Wind, Y. "An Analytic Hierarchy Process Based Approach to the Design and Evaluation of a Marketing Driven Business and Corporate Strategy." Mathematical Modeling 9.3-5 (1987): 285-291.
13. Wind, Jerry. "Effective Competitive Strategies: A Marketing Perspective." Address at the Securities Industry Association Regional Conference on Achieving Excellence in Management, Chicago, March 26, 1986: 62-80.
- 14.] Wind, Yoram. "Financial Services: Increasing Your Marketing Productivity and Profitability." The Journal of Services Marketing 1.2 (Fall 1987): 5-18.
15. Wind, Yoram (Jerry). "Targeting Global Markets: Guidelines to Meet the Marketing Challenge." Directions. Atlanta, GA: Contel Corporation, 1989. 20-23.
- 16.] Day, Diana L., John U. Farley, and Jerry Wind. "New Perspectives on Strategy Research: A View from the Management Sciences." Management Science 36.10 (Oct. 1990).
17. Wind, Yoram (Jerry). "Inducing Creativity and Innovation in Large Bureaucracies: Lessons from Marketing." Proceedings of the RGK Foundation 4th International Conference on Creative and Innovative Management. 1993.
18. Rangaswamy, Arvind, and Jerry Wind. "Don't Walk In, Just Log In! Electronic Markets and What They Mean for Marketing." Wharton School Working Paper, Dec. 1994.
19. Wind, Yoram (Jerry). "Growth Strategies." Wharton School Working Paper, 1996.
20. Wind, Jerry. "Preemptive Strategies." Wharton on Dynamic Competitive Strategy. Eds. George S. Day and David L. Reibstein. New York: John Wiley & Sons, Inc., 1997. 256-276.
21. Wind, Yoram (Jerry). "Segmentation: Accomplishments, Issues and Challenges of the Global Information Age." Proceedings of the 14th Paul D. Converse Symposium. Eds. James D. Hess and Kent B. Monroe. Chicago: American Marketing Association, 1998. 130-150.
22. Wind, Jerry. "Marketing Strategy in the Global Information Age." Mastering Marketing. Eds. Financial Times, in association with INSEAD, Kellogg, LBS, and Wharton. London: Pearson Education, 1999. 131-150.
- 23.] Wind, Jerry, and Arvind Rangaswamy. "Customerization: The Next Revolution in Mass Customization." Journal of Interactive Marketing 11.1 (Winter 2001): 13-32. Reprinted as

*Marketing Science Institute* working paper, 2000. Summarized in Insight from MSI (2000). Reprinted in Pulses (Oct. 2000) (publication of the Singapore Exchange).

24. | Wind, Jerry, and Vijay Mahajan. "The Challenge of Digital Marketing." Digital Marketing. Eds. Jerry Wind and Vijay Mahajan. New York: John Wiley & Sons, Inc., 2001. Modified version published as Wind, Jerry, and Vijay Mahajan. "Digital Marketing." European Business Forum 1.1 (Spring 2000): 20-27.
25. | Wind, Yoram (Jerry). "The Challenge of 'Customerization' in Financial Services." Communications of the ACM 44.6 (June 2001): 39-44.
26. | Mahajan, Vijay, Raji Srinivasan, and Jerry Wind. "The Dot.com Retail Failures of 2000: Were There Any Winners?" Journal of the Academy of Marketing Science 30.4 (2002): 474-486.
27. | Amit, Raffi, Cohen, Morris, Wunram, Jurgen, and Yoram Wind. "Winning the Digital Transformation Race." Wharton School Working Paper, Oct. 2002.
28. | Wind, Yoram (Jerry). "Marketing as an Engine of Business Growth: A Cross-Functional Perspective." The Journal of Business Research 58 (2005): 863-873.
29. | Wind, Jerry, Capozzi, Louis, and Monita Buchwald. "Beyond Stretch Objectives: Stretching Thinking, Strategy, and Organizational Design." Wharton School Working Paper, Apr. 2005.
30. | Wind, Yoram (Jerry). "Capitalism 3.0: Commentaries" on Jed Emerson and Sheila Bonini, "Capitalism 3.0" in VALUE and [www.valuenetwork.com](http://www.valuenetwork.com).
31. | West, Jr., Alfred P., and Yoram (Jerry) Wind. "Putting the Organization on Wheels: How SEI Uses Workplace Design and Art to Create a Corporate Culture that Drives Innovation and Growth." California Management Review. Forthcoming 2007.
32. | Wind, Jerry and David Bell. "Market Segmentation." The Marketing Book (Sixth Edition). Forthcoming.
33. | Wind, Jerry. "Rethinking Marketing: Peter Drucker's Challenge," Journal of the Academy of Marketing Science Special Issue "A Tribute to Peter Drucker," 2008.

### C. Marketing and Product Strategy

1. | Knight, Kenneth E., and Yoram Wind. "Innovation in Marketing: An Organizational Behavior Perspective." California Management Review 11 (Fall 1986): 67-78.
2. | Wind, Yoram, Bent Stidsen, and Kenneth E. Knight. "Management and Change." Manpower and Applied Psychology 2.2 (Winter 1968): 38-46.
3. | Schutte, Thomas F., and Yoram Wind. "The Marketing Concept Revisited: A Decade Recap of Its Development and Meaning." Wharton School Working Paper, Jan. 1968.
4. | Wind, Yoram. "Innovation as Marketing Orientation." Business Economics (Hebrew) 36 (Dec. 1969): 5-11.
5. | Wind, Yoram. "A Marketing Approach to the Salesman Function." Organization and Administration (Hebrew) 15 (Sept. 1969): 26-33.
6. | Wind, Yoram. "The Step Children of Marketing: Organizational and International Customers." The Wharton Quarterly 7 (Fall 1972): 43-46.
7. | Wind, Yoram. "A Note on the Operationalization of the Product Life Cycle Concept." Wharton School Working Paper, Jan. 1975.



8. Cacchione, Jr., Frank J., Dan Gross, and Yoram Wind. "Consumer Attitudes as Guidelines for the Evaluation of a New Distribution System." Moving Ahead With Attitude Research. Eds. Jerry Wind and Marshall Greenberg. Chicago: American Marketing Association, 1977. 139-143.
9. Wind, Yoram, and Tyzoon Tyebjee. "On the Use of Attitude Research in Product Policy." Moving Ahead With Attitude Research. Eds. Jerry Wind and Marshall Greenberg. Chicago: American Marketing Association, 1977. 147-156.
10. Wind, Yoram. "The Perception of a Firm's Competitive Position." Behavioral Models for Market Analysis: Foundations for Marketing Action. Eds. Francesco M. Nicosia and Yoram Wind. Hinsdale, IL: The Dryden Press, 1977. 163-181.
- 11.| Wind, Jerry. "Toward a Change in the Focus of Marketing Analysis: From a Single Brand to an Assortment." Journal of Marketing 41.4 (Oct. 1977): 12+143.
12. Wind, Yoram, and Peter T. FitzRoy. "On the Multidimensionality of Market Share." Wharton School Working Paper, Apr. 1979.
13. Wind, Yoram. "Product-Marketing Planning Models: Concepts, Techniques, and Needed Development." Analytic Approaches to Product and Marketing Planning. Ed. Allan D. Shocker. Cambridge, MA: Marketing Science Institute, 1979. 39-66.
- 14.| Wind, Yoram. "Going to Market: New Twists for Some Old Tricks." The Wharton Magazine 4 (Spring 1980): 34-39. Based on Wind, Yoram. "Product Positioning and Market Segmentation Marketing and Corporate Perspectives." Wharton School Working Paper, 1979.
- 15.| Wind, Yoram, and Vijay Mahajan. "Market Share: Concepts, Findings, and Directions for Future Research." Review of Marketing 1981. Eds. Ben M. Enis and Kenneth J. Roering. Chicago: American Marketing Association, 1981. 31-42.
- 16.| Wind, Yoram. "Significant Issues for the Future: Some Additional Perspectives - The Required Breakthrough." Journal of Product Innovation Management 2 (1984):129-132.
17. Wind, Jerry. "The Contribution of Research to Product Management and New Product Development." Keynote Address at the 36th ESOMAR Congress, Barcelona, Spain, Aug. 1983.
18. Wind, Jerry. "The Marketing Challenge." Charles Coolidge Parlin Award Acceptance Speech. Philadelphia, 1985. Wharton School Working Paper, 1985. Excerpts appeared in The Marketing News Aug. 1985.
- 19.| Wind, Jerry, and Vijay Mahajan. "Marketing Hype: A New Perspective for New Product Research and Introduction." Journal of Product Innovation Management 4 (1987): 43-39.
- 20.| Wind, Yoram, and Vijay Mahajan. "New Product Development Process: A Perspective for Reexamination." Journal of Product Innovation Management 5 (1988): 304-310. IEEE Engineering Management Review 18.1(March 1990): 52-58
21. Wind, Yoram J. "Positioning Analysis and Strategy." The Interface of Marketing and Strategy. Eds. George Day, Barton Weitz and Robin Wensley. Greenwich, CT: JAI Press, Pct. 1990. 387-412.
22. Wind, Yoram J., and Douglas E. Hill. "Salespeople as Marketing Strategists." Wharton School Working Paper, Aug. 1988.
23. Wind, Yoram (Jerry). "Innovative Distribution: The Neglected Dimension in Business Strategy," Wharton School Working Paper, August 1988.

- 24.] Wind, Jerry. "Getting a Read on Market-Defined 'Value'" Journal of Pricing Management 1.1 (Winter 1990): 5-14.
25. Wind, Yoram. "A New Approach to the Determination and Allocation of the R&D Budget." Wharton Working Paper, Feb. 1990.
26. Lee, HoonYoung, Jerry Wind, and Raymond R. Burke. "A New Approach for Screening New Product and Service Concepts: Application to Financial Services." Wharton School Working Paper, August 1992.
27. Mahajan, Vijay, and Jerry Wind. "New Product Models: Practice, Shortcomings and Desired Improvements." Journal of Product Innovation Management 9 (1992): 128-139.
28. Katahira, Hotaka, Makoto Mizuno, and Yoram Wind. "New Product Success in the Japanese Consumer Goods Market." Wharton School Working Paper, Apr. 1994.
- 29.] Bass, Frank M., and Jerry Wind. "Introduction to the Special Issue: Empirical Generalizations in Marketing." Marketing Science 14.3.2 (1995): G1-G5.
- 30.] Wind, Jerry, and Vijay Mahajan. "Issues and Opportunities in New Product Development: An Introduction to the Special Issue." Journal of Marketing Research 34 (Feb. 1997): 1-12.
31. Wind, Yoram, Nifssen, Ed, and Berend Wierenga. "Innovation as a Determinant of Firms' Financial Performance: The View of the Financial Analyst." Wharton School Working Paper.
- 32.] Mahajan, Vijay, and Yoram (Jerry) Wind. "Got Emotional Product Positioning? There's More to Positioning Than Just Features and Benefits." Marketing Management 11.3 (May/June 2002): 36-41.
33. Wind, Yoram. "Creativity and Innovation: The Management Edge." The First Annual Zoltan Wind Lecture, Herzliya, Israel, May 1996. IDC's Zoltan Wind Lecture Series.

#### **D. Research on Industrial Buying Behavior**

- 1.] Wind, Yoram, Paul E. Green, and Patrick J. Robinson. "The Determinants of Vendor Selection: The Evaluation Function Approach." Journal of Purchasing 4 (Aug. 1968): 29-41.
- 2.] Wind, Yoram. "Applying the Behavioral Theory of the Firm to Industrial Buying Decisions." The Economic and Business Bulletin 20.3 (Spring 1968): 22-28.
3. Wind, Yoram. "Integrating Attitude Measures in a Study of Industrial Buying Behavior." Attitude Research on the Rocks. Eds. Lee Adler and Irving Crespi. Chicago: American Marketing Association, 1968. 58-77.
4. Wind, Yoram. "Mathematical Analysis of Perception and Preference for Industrial Marketing." A New Measure of Responsibility for Marketing. Eds. K. Cox and B. M. Enis. Chicago: American Marketing Association, June 1968. 284-294.
5. Robinson, Patrick J., and Yoram Wind. "Generalized Simulation of the Industrial Buying Process." Marketing Science Institute Working Paper P-46-2, July 1968.
6. Wind, Yoram, and Patrick J. Robinson. "Simulating the Industrial Buying Process." Marketing and the New Science of Planning. Ed. R. L. King. Chicago: American Marketing Association, Aug. 1968. 441-448.
- 7.] Robinson, Patrick J., and Yoram Wind. "Computer Simulation - Marketing Management Tool." Computer Operations 3 (Jan. - Feb. 1969): 42-27.
- 8.] Wind, Yoram. "Industrial Source Loyalty." Journal of Marketing Research 7 (Nov. 1970): 450-457.

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#### H. International Management Education and The Lauder Institute

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2. Wind, Jerry. "The Restructured Wharton MBA: Inventing a New Paradigm." University of Pennsylvania Almanac 37 (2 Apr. 1991): 1-4.
- 3.] Wind, Jerry, and Alfred P. West, Jr. "Reinventing the Corporation." Chief Executive 71 (Oct. 1991): 72-75.
- 4.] Wind, Jerry. "The Next Paradigm?" Chief Executive 77 (June 1992): 62-65.
5. Wind, Jerry. "JIT Learning: A New Concept for Executive Education." Wharton School Working Paper, June 1993.



6. Wind, Jerry, Robert Holland, Alfred P. West, Jr., and Robert Gunther. "Pace-Setting 21st Century Enterprises: A Glimpse of What Might Emerge." Wharton School Working Paper, 29 June 1993.
7. Wind, Jerry. "Downsizing and Layoffs: Miracle Cure or Prescription for Disaster." (8 Feb. 1994).
8. Wind, Jerry. "Marketing: Big Questions for the 21st Century." Financial Times. 1996. 6-7.
9. Wind, Jerry. "Driving Change: Preparing for the 21st Century." The Li & Fung Lecture, University of Hong Kong, 17 Apr. 1998.
10. Wind, Jerry and Pedro Nueno. "The Impact Imperative: A Manifesto for Closing the Relevance Gap of Academic Management Research." International Academy of Management North America Meeting, 25 July 1998.
11. Main, Jeremy and Jerry Yoram Wind. "A Cynic's Glossary." Across the Board. 35.4. April 1998: 12.
12. Wind, Jerry. "Creating a Successful 21st Century Enterprise." Li & Fung Lecture on Commerce & Industry. Chinese University of Hong Kong, 17 Apr. 1998.
13. Wind, Jerry. "Reinventing the Business School for the Global Information Age." Wharton School Working Paper, Jan. 2000. Keynote address at European Foundation for Management Development Conference of Deans and Directors, Helsinki, Finland, Jan. 2000.
14. Wind, Jerry, and Dave Reibstein. "Reinventing Training for the Global information Age." Knowledge@Wharton. Sept. 2000.
15. Wind, Yoram (Jerry). "The Integrative Thinking Challenge for Management Education and Research." Rotman Magazine Fall 2002: 18-19. Reprinted in A New Way to Think: The Best of Rotman Magazine. Winter 2005.
16. Wind, Jerry. "Balancing Innovation and Conservative Values: Management as an Experimental Process." Conservative Values and Effective Management. Eds. Peter Drucker and Peter Paschel. Frankfurt: Redline Wirtschaft, 2004.
17. West, Al and Jerry Wind. "Putting the Organization on Wheels: How SEI Uses Workplace Design and Art to Create a Corporate Culture that Drives Innovation and Growth." California Management Review. 49. 2 (2007): 138-153.

#### J. Convergence Marketing

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2. Wind, Jerry, Vijay Mahajan, and Robert E. Gunther. "The Convergence Challenge: Realizing the Complex Promise of New Technologies." InformIT. (2001):
3. Wind, Jerry, Vijay Mahajan, and Robert E. Gunther. "The Power of Convergence: The 5 Cs." InformIT. (2001).
4. Wind, Jerry, Vijay Mahajan, and Robert E. Gunther. "Digital Fabric: Organizing for Convergence." InformIT. (Jan. 2002).
5. Wind, Jerry, Vijay Mahajan, and Robert Gunther. "The Consumer is King." European Business Forum 9 (Spring 2002): 12-13.
6. Wind, Yoram, and Vijay Mahajan. "Convergence Marketing." Journal of Interactive Marketing 16.2 (Spring 2002): 64-79.

7. Wind, (Jerry) Yoram. "Convergence Marketing: Meeting the Challenge of the New Hybrid Consumer." Critical Eye Review (Mar. - May 2005): 16-20.

#### K. Mental Models – Power of Impossible Thinking

1. Wind, Yoram and Colin Crook. "Expanding Your Peripheral Vision by Embracing New Mental Models." Wharton School Working Paper, 2005.
2. Wind, Yoram (Jerry). "Leadership as Making Sense," Wharton School Working Paper, 2003.
3. Wind, Yoram (Jerry), and Colin Crook. "Using the Power of Impossible Thinking to Build Prosperity." Rotman Magazine Spring/Summer 2004: 28-31.
4. Wind, Yoram (Jerry). "Challenging the Mental Models of Marketing." Financial Times Handbook of Management 3rd Ed. Ed. Stuart Crainer and Des Dearlove. FT Prentice Hall, 2004. 327-335.
5. Wind, Yoram and Colin Crook. "Why Models Matter: The Big Barriers to Growth and Innovation are Self-Imposed." Wharton School Working Paper, 2005.
6. Wind, Yoram (Jerry). "Challenging the Mental Models of Marketing." Does Marketing Need Reform? Fresh Perspectives on the Future. Eds. Jagdish N. Sheth and Rajendra S. Sisodia. Armonk, NY: M. E. Sharpe, 2005. 91-104.
7. Wind, Yoram (Jerry). "The Silver Lining: Seeing Opportunities in Risk." Wharton School Working Paper, 27 Apr. 2005. Presented at the Conference in Honor of Paul Kleindorfer on Recent Advances in Operations and Risk Management, Philadelphia, 5 May 2005.
8. Wind, Yoram. "Rethinking the Board." Directors & Boards 30.1 (Fourth Quarter 2005): 20-26.
9. Wind, Jerry. "Unleashing the Power of Impossible Thinking." Leadership Excellence. Forthcoming 2007.
10. Wind, Yoram. "Managing Creativity." Rotman Magazine Spring/Summer 2006: 20-23.
11. Wind, Jerry. "The Power of Impossible Thinking," Knowledge Leadership at Thomas Group (KL@TG). Inaugural Issue. Winter 2006: 76-80.
12. Wind, Yoram, and Colin Crook. "Challenging Mental Models for an Uncontrollable World." Part of the FT Mastering Uncertainty Issue, March 17, 2006.
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#### L. Entries in Dictionaries and Encyclopedias

1. Green, Paul E., and Yoram Wind. "Marketing, Statistics in." Encyclopedia of Statistical Sciences. Eds. S. Kotz, N. Johnson, and Campbell Read. New York: Wiley, 1985. 227-248.
2. Wind, Jerry, and David Schmittlein. "Definitions of Marketing Models." Dictionary of Marketing Terms. Ed. Peter D. Bennett. Chicago: American Marketing Association, 1988. 1-30.
3. Rangaswamy, Arvind, and Yoram Wind. "Information Technology in Marketing." Encyclopedia of Microcomputers. Eds. A. Kent and J. G. Williams. New York: Marcel Dekker Inc., 1992. 67-83.

- 4.] Wind, Yoram (Jerry), and Gary L. Lilien. "Marketing Strategy Models." Handbooks in Operations Research & Management Science, Vol. 5: Marketing. Eds. J. Eliashberg and G. L. Lilien. Amsterdam; NY: Elsevier Science Publishers, 1993. 773-826.
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- 6.] Wind, Yoram (Jerry). "Market Segmentation." Companion Encyclopedia of Marketing. Ed. Michael J. Baker. New York: Routledge, 1995. 394-419. Reprinted in Marketing Theory: A Short Text. Ed. M. Baker. London: Business Press, a Division of Thompson Learning, 2000. 394-419.
- 7.] Green, Paul E., Jerry Wind, and Vithala R. Rao. "Conjoint Analysis: Methods and Applications." The Technology Management Handbook. Ed. Richard C. Dorf. Boca Raton, FL: CRC Press, 1999. 12-66-12-72.
- 8.] Wind, Jerry. "Creating a Vision." The Technology Management Handbook. CRCnet Base, 2000.
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#### IV. EDITOR OF SPECIAL ISSUES

- *Journal of Marketing Research*
  - "Market Segmentation," August 1978.
  - "Innovation and New Products," February 1997.
- *Marketing Research* – "Marketing Research Forum: The State of the Art in Quantitative Research," Winter 1997.
- *Marketing Science* – "Empirical Generalizations in Marketing" (with Frank M. Bass), Vol. 14, No. 3, Part 2, 1995.
- *Management Science* (with John Farley and Diana L. Day) – "The State of The Art in Theory and Methods for Strategy Research," 1990.
- *The Wharton Quarterly*, "Marketing," Fall 1972.

#### V. EDITORIALS

<i>Journal of Consumer Research</i>	June 1977:	"New Directions for JCR"
<i>Marketing News</i>	July 1978:	"New Directions for JM"
<i>Journal of Marketing</i>	Winter 1979:	"The <i>Journal of Marketing</i> at a Crossroad"
	Spring 1979:	"Repositioning the <i>Journal</i> "
	Summer 1979:	"Bridging the Gap Between Practitioners and Academicians"
	Fall 1979:	"On the Status of Marketing Theory"
	Winter 1980:	"Marketing in the 80's"
	Spring 1980:	"Strategic Planning and Marketing: Time for a Constructive Partnership," with George Day
	Summer 1980:	"International Marketing: The Neglect Continuous," with John Farley
	Fall 1980:	"Industrial Marketing: The Sleeping Giant," with Frederick Webster
	Winter 1981:	"Journals and the Development of a Discipline"
	Spring 1981:	"Research and Management"
	Summer 1981:	"A Positive Perspective on Marketing"
	Fall 1981:	"Reflections"

*The Lauder Quarterly*

All editorials from initiation in 1986 to July 1988.

## VI. ILLUSTRATIVE RECENT OP ED AND COMMENTARIES

- Orchestra needs to change tune in contract negotiations: Settling the score must rest on the idea of working toward a collective goal, *Philadelphia Inquirer*, Commentary, November 4, 2004.
- The Wisdom of the Flip Flop, *Wharton School Publishing Newsletter*, November 2004.
- Rethinking our mental models for elections, *Newsletter of the Wharton Fellows*, November 2004.
- "Reverse mentoring can solidify collaboration among functional groups, but it cannot be the only tool that enforces such teamwork or the sole catalyst for change." Commentator on HBR "Too Old to Learn?" Case Study. *Harvard Business Review*. November-December 2000.
- "E-Learning Crossfire," *Information Week*, February 26, 2001.
- "Capitalism 3.0: Commentaries" on Jed Emerson and Sheila Bonini, "Capitalism 3.0" in *VALUE* and [www.valuenewsnetwork.com](http://www.valuenewsnetwork.com), February/March 2006.

## VII. EDITED PUBLICATIONS OF THE SEI CENTER – ILLUSTRATIVE LIST

- Creating and Implementing a Corporate Vision, January 1990.
- Human Resources: Management for the 21<sup>st</sup> Century, January 1990.
- The Impact of Artificial Intelligence on Management Decision Making and Organizational Design, February 1990.
- Creating and Implementing Quality in Organizations, March 1990.
- Corporate Governance: Who's in Charge?, May 1990.
- Strategic Information Architecture: Increasing Productivity, Managing Risks, June 1993.
- Management in the 21<sup>st</sup> Century: Predictions From Top Think Tanks, September 1990.
- The Individually Empowered Organization, November 1990.
- Innovation and New Product Development for the 21<sup>st</sup> Century Enterprise, November 1990.
- Ethical Standards for Global Corporations? December 1990.
- Managing Infrastructure Costs; What is the Best Strategy for Long-Term Controls? February 1991.
- Lessons from the Malcolm Baldrige Award: Implications for Management Practice, Research, and Education, February 1991.
- Innovation in Services, May 1991.
- Visionary Leadership, October 1991.
- The Impact of Information Networking on Organizational Design and Strategy, November 1991.
- Frontiers in Electronic Commerce: Experimental Systems for Communication, Coordination, and Negotiation, February 1992.
- Innovation and Learning, March 1992.
- Historical Perspectives in Management Education, April 1992.
- Decision Making in Highly Uncertain Political Environments: Investing in the Russian Oil and Gas Industry, March 1992.
- Issues and Advances in New Product Development, June 1992.
- Rewarding the Workforce of the Future: Competence-Based Performance Measures and Incentives, October 1992.
- Designing Corporate Governance for the 21<sup>st</sup> Century Global Enterprise: International Perspectives, January 1993.
- Dr. Peter Drucker on "The New Organization," April 1993.
- Corporate Performances: Beyond Financial Measures, April 1993.
- The Horizontal Organization, October 1993.
- The End of Diversity: Rights, Responsibility and the Communication Agenda November 1993.
- Deploying Strategic Assets: Beyond Core Capabilities, November 1993.
- Research Challenges in Linking Quality: Profitability and Organizational Architecture, December 1993.
- Empirical Generalizations in Marketing, February 1994.
- Beyond Quality: Organizational Transformation for the 21<sup>st</sup> Century Enterprise, March 1994.
- Exploratory Conference on Business Ethics: Building the Common Ground, March 1994.
- Interactivity is Two-Way: Life on the Net April 1994.



- Interactive Industry 2000: Who's Gonna Buy this Stuff: Research for the Interactive Television Business, July 1994.
- Leadership in the 21<sup>st</sup> Century Enterprise, November 1994.
- A New Management Paradigm for the 21<sup>st</sup> Century, December 1994.
- The Virtual University, January 1995.
- Go West Young MBA, Far Far West: Adventures on the World's Business and Management Frontier, January 1995.
- Information Technology and the Changing Boundaries of the Firm, January 1995.
- EMU – The Road to Europe, February 1995.
- The New Science and Emerging Paradigms in Business, April 1995.
- Innovation in New Product Development: Best Practices in Research, Modeling and Applications, May 1995.
- The Bamboo Network, November 1995.
- Corporate Growth Engines, December 1995.
- A Trapezoidal Corporation, February 1996.
- The Impact of Computers and Information on Management: 1946-1996-2001, May 1996.
- European Venture Capital Industry, November 1996.
- The CEO Challenge: Implementing Strategy in a Constantly Changing Marketplace, December 1996.
- The Future of Impact of Information Management: A Lecture Series from July 1996-January 1997.
- New Media, February 1997.
- From Detection to Action: Processes and Insights Gained from an Early Warning Signal System, March 1997.
- Toward New Corporate Governance Models: Lessons from the Japanese and U.S. Experience, March 1997.
- When Is It Worthwhile Targeting the Majority Instead of the Innovators in a New Product Launch? November, 1997.
- Consumer Choice Behavior in On-line and Regular Stores: The Effects of Brand Name, Price, and Other Search Attributes, January 1998.
- The Systems Approach: The New Generation, February 1998.
- Managing Workteam Diversity, Conflict, and Productivity: A New Form of Organizing in the 21<sup>st</sup> Century Workspace, September 1998 (by Etty Jehn, The Diversity Research program with Bob Holland).
- GM for the 21<sup>st</sup> Century: From "Make and Sell" to "Sense and Respond," March 1999 (by Vince Barabba).
- The Limits of Privacy, March 1999 (by Amitai Etzioni).
- Japan at the Great Divide, April 1999 (by Yasuhisa Shiozaki).
- Into the 21<sup>st</sup> Century: The First Decade and Beyond: A Report on the SEI Center for Advanced Studies in Management, 1990-2000.

#### VIII. EDITOR: WHARTON SCHOOL PUBLISHING BOOKS

##### 2007

1. Aswath Damodaran, *Strategic Risk Taking: A Framework for Risk Management*
2. Rajendra S. Sisodia, David B. Wolfe, Jagdish N. Sheth, *Firms of Endearment: How World-Class Companies Profit from Passion and Purpose*
3. Leonard M. Lodish, Howard L. Morgan, Shelly Archambeau, *Marketing That Works*
4. Howard Moskowitz, Alex Gofman, *Selling Blue Elephants: How to Make Great Products That People Want BEFORE They Even Know They Want Them*
5. Daniel M. Cable, *Change to Strange: Create a Great Organization by Building a Strange Workforce*
6. Jagdish N. Sheth, *The Self-Destructive Habits of Good Companies...And How to Break Them*

##### 2006

1. Peter Navarro, *The Well Timed Strategy: Executing Strategy Through the Business Cycle for Competitive Advantage*
2. Stuart Lucas, *Wealth: Grow It, Protect It, Spend It and Share It* (Paperback, 2007)
3. Peter Killing, Thomas Malnight, and Tracey Keys, *Must-Win Battles: How to Win Them*,

*Again and Again*

4. Neil Bender, Paul Farris, Philip Pfeifer, and Dave Reibstein, *50+ Marketing Metrics Every Business Executive Should Know*
5. Russell Ackoff, Herbert Addison, and Jason Magidson, *Idealized Design: How to Dissolve Tomorrow's Crisis...Today*
6. Lars Kolind, *The Second Cycle: 7 Proven Tools for Revitalizing Your Business...Before It's Too Late*
7. George Chacko, Anders Sjoman, Hideto Motohashi, and Vincent Dessain, *Credit Derivatives: Introduction to Credit Risk and Credit Instruments*
8. Jerry Porras, Stewart Emery, and Mark Thompson, *Success Built to Last: Creating a Life that Matters*
9. Philip Kotler and Nancy Lee, *Marketing in the Public Sector: A Roadmap for Improved Performance*

**2005**

1. Randall Billingsley, *Understanding Arbitrage: An Intuitive Approach to Financial Analysis*
2. Tony Davila, Marc Epstein, and Robert Shelton, *Making Innovation Work: How to Manage It, Measure It, and Profit from It*
3. Sunil Gupta and Donald Lehmann, *Managing Customers as Investments: The Strategic Value of Customers in the Long Run*
4. Stuart Hart, *Capitalism at the Crossroads: The Unlimited Business Opportunities in Solving the World's Most Difficult Problems* (2<sup>nd</sup> Edition, 2007)
5. Lawrence Hrebiniak, *Making Strategy Work: Leading Effective Execution and Change*
6. Jon Huntsman, *Winners Never Cheat: Everyday Values We Learned as Children (But May Have Forgotten)*
7. Eamonn Kelly, *Powerful Times: Rising to the Challenge of Our Uncertain World*
8. Doug Lennick and Fred Kiel, *Moral Intelligence: Enhancing Business Performance and Leadership Success* (Paperback, 2007)
9. V. J. Mahajan and Kamini Banga, *The 86 Percent Solution: How to Succeed in the Biggest Market Opportunity for the Next 50 Years*
10. Alred Marcus, *Big Winners and Big Losers: The 4 Secrets of Long-Term Business Success and Failure*
11. Kenichi Ohmae, *The Next Global Stage: Challenges and Opportunities in Our Borderless World*
12. Michael Roberto, *Why Great Leaders Don't Take Yes for an Answer: Managing for Conflict and Consensus*
13. Arthur Rubinfeld and Collins Heminway, *Built for Growth: Expanding Your Business Around the Corner or Across the Globe*
14. David Sirota, Louis Mischkind, Michael Meltzer, *The Enthusiastic Employee: How Companies Profit by Giving Workers What They Want.*
15. Thomas Stalkamp, *SCORE!: A Better Way to Do Business\$: Moving from Conflict to Collaboration*
16. Glen Urban, *Don't Just Relate – Advocate!: A Blueprint for Profit in the Era of Customer Power.*
17. Craig Vogel, Jonathan Cagan, and Peter Boatwright, *The Design of Things to Come: How Ordinary People Create Extraordinary Products.*

**2004**

1. Bernard Baumohl, *The Secrets of Economic Indicators: Hidden Clues to Future Economic Trends and Investment Opportunities* (2<sup>nd</sup> Edition, 2007)
2. Sayan Chatterjee, *Failsafe Strategies: Profit and Grow from Risks that Others Avoid*
3. Robert Mittelstaedt, *Will your Next Mistake Be Fatal? Avoiding the Chain of Mistakes that Can Destroy your Organization*
4. Mukul Pandya, Robbie Shell, Susan Warner, Sandeep Junnarkar, Jeffrey Brown (2004), *Nightly Business Report Presents Lasting Leadership: What You can Learn from the Top 25 Business People of our Time* (Paperback, 2006)
5. C.K. Prahalad, *The Fortune at the Bottom of the Pyramid* (Paperback, 2006)
6. Scott Shane, *Finding Fertile Ground*
7. Oded Shenkar, *The Chinese Century: The Rising Chinese Economy and Its Impact on the Global Economy, the Balance of Power, and your Job* (Paperback, 2006)
8. Jerry Wind and Colin Crook, *The Power of Impossible Thinking* (Paperback, 2006)

## IX. ILLUSTRATIVE PUBLISHED ABSTRACTS OF PAPERS DELIVERED IN PROFESSIONAL MEETINGS

- "Enduring Vs. Situation Dependent Customer Characteristics as Bases for Market Segmentation: An Evaluation," in David L. Sparks, (ed.), *Broadening the Concepts of Marketing*. Proceedings of the American Marketing Association, August 1970 Conference.
- "Preference of Relevant Others and Individual Choice Models," in W.L. Nichols, ed., *Proceedings of the 1974 AAPOR Conference and in Public Opinion Quarterly*, 38. Fall 1974, pp. 447.
- "Multivariate Decision-Making in the Setting of Pulmonary Outpatient Clinic," with Lawrence Spitz and Ronald Daniele. Paper presented at American College of Physicians, San Francisco, April 1975.
- "Diagnosis Consumer Behavior: A Quantitative Approach," in D. Rothwell, (ed.), *Proceedings of the 30<sup>th</sup> Annual AAPOR Conference* May 1975 and in *Public Opinion Quarterly*, 39. Fall 1975, pp. 415.
- "Segmentation and Positioning of Health Insurance Services Under Conditions of Heterogeneous Health Insurance Portfolios," in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 244.
- "Alternative Approaches to Industrial Market Segmentation," with Paul E. Green, in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 234.
- "Innovation and the R&D-Marketing Interface," with Joel Goldhar, in TIMS/ORSA Bulletin for the Atlanta Meeting, November 1977.
- "Measurement Issues in Portfolio Analysis," with Vijay Mahajan, in R.P. Leone, (ed.), *Proceedings of Market Measurement and Analysis*, TIMS, 1980, pp. 50-53.
- "Imagery Products: A Measurement Challenge," with Lew Pringle, in J. Keon, (ed.), *Market Measurement and Analysis*, TIMS/ORSA, 1981.
- "Standardized Portfolio Models: An Empirical Comparison of Business Classification," with Vijay Mahajan and Donald J. Swire in Allan D. Shocker and R. Srivastava, (eds.), *Proceedings of the 1981 Analytical Approaches to Product and Marketing Planning Conference*.

## X. CASE STUDIES

- During the academic year 1962-1963, I wrote a number of marketing cases at the Hebrew University, Jerusalem (Israel). One of these cases, The Ozi Ballpoint Pen III, was published in Harper W. Boyd, Jr. et al., (eds.), *Marketing Management: Cases from the Emerging Countries* (Reading, MA: Addison-Wesley Publishing Company), 1966.
- During the academic year 1968-1969, several marketing cases were written under my supervision at the Leon Recanati Graduate School of Business Administration, Tel Aviv University.



## **CONSULTING EXPERIENCE**

### **A. Marketing, Business Strategy, and Marketing Research Consulting**

#### *1. Information and Telecommunication Industry*

- AT&T & the Bell companies: Occasional consultant to various units, including:
  - AT&T Technologies Inc. – Design a market segmentation program (1986)
  - AT&T – Review and Design of Portfolio System (1981-1982)
  - Bell Atlantic – Marketing & pricing strategy (1983)
  - Bell Canada – Design of a segmentation study and product portfolio (1979-1980)
- Geometric Data: Segmentation/positioning studies (1981-1982)
- IBM:
  - ABS Division: Developing procedure for Integrating Marketing and R&D (1988-1989)
  - ES Division, Marketing Strategy and Segmentation (1991-1993)
- Motorola Broadband Sector: 1998-2004. Business Strategy consulting
- Next Level Communication: Business strategy consulting (2000)
- Newsweek, Inc.: Marketing consulting (1979-1980)
- Northern Telecom: Value Pricing and Business Strategy Consulting (1993-1995)
- RCA, Government Communications Systems: Design of a research program to assess the market response to new Electronic Mail System (1978-1979)
- Samsung, Management of Technological Innovation (2006)
- Telenet, Strategies for “Getting More with Less” (2006)
- Xerox: Marketing consulting to a design integration program (coordinated by Jay Doblin Associates) and design of a market segmentation project (1982-1983)

#### *2. Financial Services*

- SEI: Marketing, Business and Corporate Strategy consulting (1986-)
- 
- Chase Manhattan Bank: Process for evaluation of mergers and acquisitions and design of segmentation studies (1978-1979)
- CitiBank: Statistical consulting (1980); marketing strategy consulting (1996-1997)
- Colonial Penn Group: Design and evaluation of most of the firm's research activities and general consulting to marketing and top management (1973-1980)
- E. F. Hutton: Design and implementation of a marketing planning system and various marketing research projects (1979-1984)
- Edward Jones & Co.: Marketing and Business Strategy consulting (1984-2004)
- Reliance Insurance Companies: Marketing research consulting (1980-1981)

#### *3. Health Care*

- Bristol-Myers Squibb (BMS): Marketing strategy consulting (1997-2002)
- Merck, Sharp, and Dome: General marketing research consulting (1981)
- Merck & Co.: Marketing Strategy and Marketing Research and Modeling (1991-1996)
- Pfizer, Inc.: 1975-1990. Design and analysis of most of the marketing research projects of Pfizer Laboratories and Roerig. Occasional marketing strategy consultant to the Hospital Products Group (1984-1986) and Pfizer Pharmaceuticals (1987-1990).
- SmithKline Beckman: Marketing strategy development for TAGAMET (1987-1988); evaluation of strategy implementation (1989)
- SmithKline Clinical Laboratories: Marketing planning (1984)
- Sterling Drug, Inc.: Development of marketing driven portfolio of R&D projects (1986-1991); Pricing study for innovative new product (1991-1992)
- Upjohn: Strategic planning consulting (1981)
- West Jersey Health System: Marketing and Business Strategy (1985)



#### 4. *Transportation*

- Air Canada: Market segmentation, positioning and new product development (1973)
- Chrysler: Modeling the advertising budget (1978), advising regarding the analysis of customer satisfaction process (1995-1997)
- Conrail: Design of a positioning/segmentation study (1978-1979)

#### 5. *Consumer Goods*

- American Dairy Brands and Schreiber Foods, Inc.: Arbitration (2004)
- Campbell Soup: Advertising Strategy, 91-96, 2005-07; Taste Tests (2001-2003)
- Coors Brewing Company, Pricing and positioning (2001)
- DAYMON: Marketing Strategy (since 2003-05)
- Eastman Kodak: New product research approaches (1978)
- R.J. Reynolds Tobacco Co.: Evaluation and design of a new product development system (1979-1980)
- S.B. Thomas: Marketing and research consultant (1979-1980)
- Simplicity Patterns, Inc.: Develop a business plan (1982)
- Pepsi: Research support for the Pepsi Challenge and related campaigns (1978, 1981, 1990, 1995, 1999)

#### 6. *Industrial Products and Services*

- International Harvester: Designing a market segmentation process (1980)
- Stauffer Chemicals: General marketing consulting (1980)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)
- John Fluke Manufacturing Co., Inc.): Marketing and corporate strategy (1985-1988)
- ITT Water Technology Group (2004-2005)

#### 7. *Retailing*

- Sears Roebuck & Company: Advertising and marketing strategy (1972-1973)
- Wickes, plc: U.K. Marketing and Business Strategy Consulting (1988-1996)

#### 8. *Professional Service Firms*

- Applied Communication Research (1974-1976)
- BBD&O (on an occasional basis, 1974-1985)
- Cunningham and Walsh, Inc. (1978)
- DMB&B (1993)
- Doyle Dane Bembach: Evaluation of a campaign claim (1980)
- Gahagan Research Associates, Inc. (selected projects, 1972-1978)
- Hakuodo. Marketing Strategy for the 21<sup>st</sup> Century (1992-1995)
- IMS America (1997)
- Market Research Corporation of America (MRCA) (1975-1987)
- McConnel Advertising (Montreal), (1974)
- Medicus (1989-1997)
- Morgan, Lewis & Bockius: Development of Business Strategy (1992-1994)
- MS&L: Marketing consulting (1995-1997; 2001-2002)
- National Analysts (1975-1976)
- Oxtoby-Smith (selected projects, 1972-1978)
- Price-Waterhouse Coopers LLP (marketing and corporate strategy consulting, 1996-2001).
- Professional Marketing Research, Inc. (1977-1978)
- Robinson Associates (1969-1975)
- Standard & Poors (1997-2000)
- Whittlesey and Partners (1972-1973)
- Y & R (1989)

*9. Trading Companies, Real Estate Development*

- Li & Fung: Business Strategy consulting (1998-)  
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- Dewey Companies: Marketing and Business Strategy consulting (2003)

**B. Directorship**

- IDT (2005-)  
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- Ecquaria (2001-04)
- Enhance Financial Services (1997 until acquisition by Radian Group, Inc. in 2001)
- Credit 2B (2001)
- CASA – Center for Adaptive Systems Applications Inc. (1999 Until acquisition by HNC in 2000)
- Access Technologies Group, co-founder and chairman (1992-1996)
- Contel Corporation, member of the Board of Directors (1988 Until acquisition by GTE in 1991)
- Dover Regional Bank Shares, member of Board of Trustees (1986-1990)
- Shooting Stars, Inc., member of the Board of Directors (1986-1990)
- Reality Technologies, Inc. (1988-until acquisition by SEI Investments in 1990)
- The Cortlandt Group, Inc., Co-founder and Chairman of the Board of Directors, (1979-1986)

**C. Illustrative Advisory Boards**

- NetXentry (2000-)
- Mutual Arts (2003-)  
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- Ad4ever (2000-2003)

**D. Expert Witness: Marketing and Marketing Research Consulting in Legal Cases**

- Alschuler, Grossman and Pines: Packard Bell vs. Compaq, 1995-1996
- Arent, Fox, Kitner, Plotkin & Kahn: Marketing research consulting re: Estee Lauder, 1987
- Arnold, White and Dunkee: The Clorox Co. vs. Dow Brands Inc. re: Smart Scrub v. Soft Scrub, 1995
- Arnold & Porter:
  - (a) Schering v. Pfizer, Perceived sedation of Zyrtec, 2000
  - (b) Pfizer: Physicians' beliefs concerning prescription antihistamine products in terms of their sedating/non-sedating characteristics 2002
- Baker & McKenzie:
  - (a) G.D. Searle & Co. and subsidiaries litigation in the U.S. Tax Court, 1982
  - (b) American Republic Insurance Co. vs. Americare Inc. and American Dental Centers P.C., 1988
- Berle, Kass and Case: Evaluation of public attitude re: Burlington County Bridge Commission, 1992
- Bilzin Sumberg Attorneys at Law, Lennar Corporation vs. Michael C. Morgan, 2007
- Blanchard, Krasner & French, Consulting Re. Aerus, 2006-2007
- The Calorie Control Council vs. FTC re: the Saccharin case, 1979
- Covington and Burling:
  - (a) The Proprietary Association vs. FTC re: over-the-counter (antacids) drugs, 1979
  - (b) FTC Staff Report on cigarette advertising investigation 1981-1983 including appearance before congressional committee in hearing on H. R. 1824: "The Comprehensive Smoking Prevention Education Act"
  - (c) International Telecharge Inc. vs. AT&T, 1992-1994
  - (d) Dream Team Collectibles vs. NBA Properties (re: Dream Team), 1996
  - (e) G. A. Modelfine S.A. v. Armani.com, 2003-2004
  - (f) Defence in Class Action Re: IBM REAP Educational Benefit, 2006-
  - (g) Spirits Int Nv vs. S.S. Taris Zeytin Vezeytinyagi Birliei, Re: Moskovskaya, 2006-
- Cravath Swain and Moore:

- (a) Amertech Corporation, *et. Al.* v. Lucent Technologies Corporation [Arbitration], 1997
  - (b) Louis Vuitton v. Dooney & Bourke, Inc., 2004
- Crude Oil Resellers vs. U.S. Department of Energy Economic Regulatory Administration re: the proposed crude oil reseller price regulations, 1979, including presentation at public hearing
- Darby and Darby. Proctor & Gamble vs. Colgate, Palmolive, and Y&R re: China advertising, 1997
- Davis Polk & Wardwell LLP, P&G and Sanofi-Aventis US vs. Hoffman-La Roche Inc and GlaxoSmithKline, Inc. Re. Boniva, 2007
- Dechert Price & Rhoads:
  - (a) The Mutual Assurance Co. vs. American Council of Life Insurance and Health Insurance Association of America (re: The Green Tree), 1983-1984
  - (b) INC vs. Manhattan, Inc., 1985
  - (c) Tunis Brothers Co. vs. Ford Motor Credit Co., 1988
  - (d) Allerest vs. Alleract, 1988-1990
  - (e) Campbell Soup Co. vs. Conagra, Inc. (Various deceptive advertising cases) 1991-1996
- Department of Justice, Antitrust Division: Consulting in a number of cases since 1996, including Microsoft Network, ski resorts, Echostar's proposed acquisition of DirecTV, and dental supplies
- Dilworth, Paxson, Kalish, Levy and Kauffman: Prince Castle vs. Le-Jo Enterprises, 1977-1978
- Forrest, Hainline III, American Pasta Co. vs. New World Pasta Co. (re: "America's favorite pasta"), 2002
- Fulbright & Jahorski: Deere and Co. vs. MTD Holdings, 2003
- Gibson, Dunn, & Crutcher:
  - (a) Pfizer, Inc. vs. International Rectifier Corp., 1982-1983
  - (b) Thompson vs. General Nutrition Corp., 1985
  - (c) New Vector vs. Metro Mobile, 1986;1992
  - (d) Air Passenger CRS Antitrust Litigation vs. American Airlines, 1987-1990
  - (e) Quintons/Mahurkar vs. Shiley
  - (f) McCaffrey vs. Pfizer re: Plax, 1990
  - (g) The Travel Difference vs. The Time Mirror Co. (LA Times), 1992
  - (h) Toyota re: class action defense vs. Staples Stillwell on the "destination charge" on Monronery Stickers, 1995-1996; 1999-
  - (i) Hewlett-Packard vs. Nu-Kote Int. Inc., Anti-trust, 1998-1999
  - (j) LA Cellular AT&T Wireless class action defense, 2002, 2004-
  - (k) Hewlett Packard defense vs. Staple Stilwell in class action suit re economy cartridge, 2003
- Gold, Farrel & Marks: Miramax Film Corp. vs. Columbia Pictures Entertainment, re: *I Know What You Did Last Summer* (1997)
- Goodwin Procter LLP:
  - (a) FTC vs. New Balance re: "made in USA", 1995-1996 [FTC Hearing] and consulting, 1998
  - (b) Public Media Center and People of the State of California vs. Tri-Union Seafoods, Delmonte Corp & Bumble Bee Seafoods. Re: Proposition 65 Mercury In Tuna, 2006
- Greenberg Traurig LLP: Chatham et al v. Sears Roebuk & Co. Re: Craftsman Made in USA, 2007-
- Hapgood, Calimafole, Kalil, Blaustein & Judlowe: Merrill Lynch vs. Paine Webber (re. RMA), 1985
- Heller, Ehrman, White, and McAuliffe: Apple Computer Securities Litigation, 1985-1986.
- Herling, Lindeman, Goldstein and Siegal: Roli Boli vs. Pizza Hut, 1997
- Hill, Betts, and Nash: Fender Musical Instruments Inc. vs. E.S.P. Co., 1985
- Howrey, Simon, Arnold & White:
  - (a) Sands, Taylor and Wood vs. The Quaker Oats Co. re: Thirst-Aid, 1987
  - (b) Syntex, Inc. vs. Schering-Plough Healthcare Products, Inc. re: Femcare, 1992
  - (c) Anheuser Busch (re Bud Dry commercials), 1993
  - (d) Anheuser Busch vs. Labatt (re: Ice Beer), 1994-1995
  - (e) Anheuser Busch vs. Samuel Adams, 1995
  - (f) Anheuser Busch vs. United Guinness Distillers (re: Red Label from Budweiser), 2002
  - (g) Nissan North America vs. BMW (re: "Z"), 2002
  - (h) Consulting Re: Schering Plough, 2007
- IT&T Continental Baking vs. FTC re. Fresh Horizons advertising, 1977-1978
- Jenner & Block:
  - (a) General Dynamics vs. AT&T. re: Antitrust litigation, 1987-1990
  - (b) AT&T vs. MCI re: Telemarketing Practices 1990

- (c) Recording Industry Association of America, Re: Adjustment of Rates & Terms for Satellite Digital Radio Services (Copyright Royalty Board), 2006-
- Kaye, Scholer, Fierman, Hays & Handler:
  - (a) Automated Bread Dist. Corp. vs. General Foods Corp. (Re: Freihofer Baking Co.), 1991-1992
  - (b) Zone Perfect Nutrition Co. vs. Hershey Foods Co., 2004
- Kenyon & Kenyon:
  - (a) Mead Data Control, Inc. vs. Toyota Motor Sales, U.S. re: Lexis vs. Lexus, 1988
  - (b) Hiram Walker and Sons vs. White Rock Distilleries re: Kapala-Kahlua
  - (c) America Online vs. AT&T Corp. re: ATT&T's "You Have Mail", 1999
  - (d) Twentieth Century Fox Film vs. Marvel Enterprises, Inc. (re: Mutant X), 2002
  - (e) Petition for Cancellation of the Registration of the Gakic Mark, 2006
- Kirkland and Ellis
  - (a) Kraft Foods Inc. and Capri Sun vs. Minute Maid, 1997
  - (b) Time Inc. vs. Peterson Publishing Co. re: Teen vs. Teen People, 1997-1998
  - (b) Brach and Brock vs. James River re: Royals candies, 1998-1999
  - (c) Hermes vs. Lederer, re: the Kelly Handbag, 1998-2001
- Kirkpatrick and Lockhart: McPalland et al v. Keystone Health Plan Central, Inc. (re: class certification of SeniorBlue Customers, 2001-2002)
- Kleinfeld, Kaplan and Becker: re: Iron-Kids Bread Package, 1991
- Lee, Toomey, and Kent Pfizer Pharmaceuticals vs. the IRS, 1978-1979
- Lempres & Wulfsberg and Kutak, Rock, & Campbell: Evaluation of Expert Reports, re: International Pharmaceutical Products, Inc., 1985-1990
- Liddy, Sullivan, Galway, and Begler:
  - (a) Coopervision, Inc. vs. CTL, Inc. (re: Permatint), 1985
  - (b) Johnson & Johnson, Inc. vs. Oral-B Laboratories (re: Minute-Gel), 1987
  - (c) Soft Sheen's Care Free Curl vs. Revlon's I of Nature (Trademark), 1986-1987.
  - (d) Oral-B Laboratories, Inc. vs. Johnson & Johnson, Inc. (re: Reach Advertising), 1986-1994-1995
- Lowenstein, Sandler: Princeton Economics Group vs. AT&T (re: class action defense of spirit), 1994-1995
- Maurice Blackburn Cashman Pty Ltd: Biota Holdings Ltd and Anor vs. Glaxo Group Ltd. & Ors. Re: Relenza, 2006-
- Mitchell, Silberberg & Knupp: Stella Foods Inc. vs. Cacique IC, re: Ranchero, 1997-1999
- Morgan, Lewis and Bockius: Scott paper defense in the Turnabout Marketing Case, 1983
- Morison, Cohen, Siner, and Weinstein, Hertz v. Avis, 1994.
- Munger, Tolles and Olson:
  - (a) FTC vs. Polygram Holdings et al. re: Three Tenors Case 2001-2002
  - (b) Universal vs. MGM (re: Rollerball) 2002
- Odutola Law: Spirits Int. Nv. vs. Distilleries Melville Ltd. Re: Moskovskaya vs. Moskova, 2007-
- Pattishall, McAuliffe, Newbury, Hilliard, & Geraldson:
  - (a) S.C. Johnson and Son, Inc. vs. Carter Wallace ("Edge" vs. "Rise"), 1983
  - (b) Anheuser Busch vs. Stroh Brewery Co. and vs. Miller and Heillman, (re: LA beer), 1984-1985
  - (c) S. C. Johnson & Son Inc., re: L'envie, 1986-1987.
  - (d) Shelby Motor vs. Ford, 1988.
  - (e) GFA Brands Inc. and Fitness Foods Inc. vs. Canbra Foods Ltd. and Campbell Mithun/Esty, Inc. re Heartlight, 1990-1991.
  - (f) AT&T vs. MCI (various deceptive advertising cases) 1991-
  - (g) Walt. Disney vs. Good Times, 1993
  - (h) Car Freshener Corp. vs. S.C. Johnson and Son, Inc. (re: Glade Plug Ins Air Freshener Design), 1994
  - (i) International Telecharge, Inc. vs. AT&T, 1992-1994
  - (j) S.C. Johnson and Son, Inc. vs. Avon (re: Skin So Soft) 1996
  - (k) GTE Card Services Inc. vs. AT&T, 1996
  - (l) SunAmerica Corp. vs. Sun Life Assurance Co. of Canada 1993-1995, 1997-1998 [W.H. Covington and Burling]
  - (m) Blue Cross Blue Shield vs. American Medical Association, re: CPT, 1998
  - (n) Encyclopedia Britannica, Inc. vs. Britannica Home Fashions, Inc., 1999
  - (o) Simon Property Group, L.P. v. mySimon Inc., 2001-



- (p) Montblanc – Simplo GmbH v. Savonnerie et Parfumerie Bernard, 2001
- (q) Old World Industries, Inc. vs. AutoMeter Products, 2002
- (r) JLJ Inc. v. Santa's Best Craft (Christmas tree lights), 2004
- (s) Energy Brands Inc. (Glaceau) vs. Pespico Inc. + South Beach Beverage Co., Inc Re: Sobe Life Water, 2006
- (t) Auto Meter Products Inc. v. Maxima Technologies & Systems LLC, 2006-
- Paul, Weiss, Rifkin, Wheaton and Grasser:
  - (a) Revlon vs. L'OREAL re: Colour Endure Commercials 1995
  - (b) Revlon vs. Cover Girl self renewing lipstick advertising, 1996 [NAD]
- Pepper, Hamilton and Scheetz:
  - (a) Del Monte Corp. vs. Sunkist Growers, Inc. Arbitration, 1990-1991
  - (b) Sun Oil Company defense against class action certification, 1996-1997
- Pennie & Edmonds IT&T Continental Baking (C&C Cola): defense against Coca Cola re: C&C Cola, 1978
- Pillsbury, Madison & Sutro: Consulting re:
  - (a) Thrifty Rent-A-Car vs. Elder, 1991-1992
  - (b) Green Giant American Mixtures, 1994
  - (c) Chrysler Corp. vs. Replacement Sheet Metalparts Distributors, 1992-1993
- Pillsbury Winthrop LLP
  - (a) Mulligan v. Pacific Bell Telephone Co. (inside wiring), 2004
  - (b) State of California vs. Tri-Union Seafoods, et al. (Canned Tuna, Proposition 65)
- Rogers and Wells [and the Italian Trade Commission], re: Italian pasta dumping case, 1996
- Sidley and Austin:
  - (a) Industrial Gas litigation, 1986
  - (b) Land O'Lakes, Inc. vs. Bakers Franchise Ltd., 1987
  - (c) Ultramar, Inc. vs. CITGO Petroleum Corporation, 1997
  - (d) AT&T vs. US West Communications, re: US West advertising, 1998
- Sills, Cummis, Zuckerman, Radin, Tischman, Epstein and Gross: E.R. Squibb and Sons, Inc. vs. Stuart Pharmaceuticals, 1991.
- Skadden, Arps, Meagher, & Flom:
  - (a) American Home Products vs. Beecham re: Delicare commercials, 1986
  - (b) Tambrands, Inc. vs. Warner-Lambert Co. re: EPT commercials, 1986-1987
  - (c) Beecham Inc. vs. Yankelovich, Clancy, Shulman and Saatchi & Saatchi Holdings, Inc., re: projections for Delicare, 1986-1988
  - (d) American Express vs. MasterCard re: Goldcard, 1988
  - (e) Challenge to the networks by Sterling Drug re: Bristol Myers Tribuffered Bufferin commercials, 1988
  - (f) Challenge by Dow Brands, Inc. of the TV advertisement for Reynolds Metals Company's "SURE-SEAL" food storage bags, 1989
  - (g) Anheuser-Busch Company vs. Coors Brewing Company (various deceptive advertising cases) 1991-1993
  - (h) R.H. Donnelley vs. Sprint Publishing and Adv. Inc., re: Sprint Yellow Pages, 1996
  - (i) Anheuser Busch vs. Boston Beer re: A-B advertising [NAD], 1997
- Steptoe & Johnson LLP: DirectTV Inc. and EchoStar Satellite LLC v. Tax Commissioner of Ohio 2006-2007
- Sullivan & Cromwell: Remington Rand Corp. vs. Amsterdam-Rotterdam Bank N.V., 1991
- Van Hagey & Bogan, Ltd.: Consulting re: The Quaker Oats Co, 1991
- Weil, Gotshal and Manges:
  - (a) Johnson & Johnson vs. SmithKline Beecham, Re: Tums Advertising, 1991
  - (b) Schering-Plough Healthcare Products vs. Johnson and Johnson, Inc. re: Neutrogena Chemical-Free Sun Block, 1996
  - (c) Pharmacia Corp. vs. Glaxosmith Kline Consumer Healthcare (re: NicoDerm advertising), 2002-2003
  - (d) Priceline.com re: NAD, 2003
- White & Case:
  - (a) Trovan Ltd. and Electronic Identification Devices vs. Pfizer Inc. re: Trovan's trademark, 1999
  - (b) Frederick E. Bouchat v. Baltimore Ravens, Inc. and NFL Properties Inc., (re: the Ravens Logo), 2001-2002

- (c) Oakland Raiders vs. TBB and NFL, 2003 [with Bingham McCutchen]
- Whiteman, Breed, Abbott & Morgan:
  - (a) Pepsi Cola Company: Defense against Coca Cola Co. re: The Pepsi Challenge, 1978; 1981; 1995 [Mostly with the NAD]
  - (b) Burger King Comparative Advertising Campaigns vs. McDonald's and Wendy's, 1982-1990
- Winston & Stawn, LLP
  - (a) Verizon Directories Corp. v. Yellow Book USA, Inc., 2004
  - (b) Merix Pharmaceuticals vs. GlaxoSmithKline, Re: Releev, 2006
  - (c) Dyson Technology Ltd. vs. Maytag Corp., 2006-2007

**E. Illustrative Marketing Research Clients:**

1. Air Canada (1973)\*
2. American Cyanamid (1972-1973)\*
3. Atlantic Richfield Company (1971-1972)\*
4. Bankers Trust Company (1973-1974)\*
5. Bell Telephone Company of Pennsylvania (1974;1977)
6. BBD&O (1974-1982)
7. Bissell, Inc. (1969-1971)\*
8. Bristol Myers Squibb (1998-)
9. Brown & Williamson Tobacco Corp. (1978-1979)
10. Bureau of Newspaper Advertising (1974)\*
11. CBS (1972)
12. Campbell Soup Company (1972-1973)\*
13. Chrysler (via BBD&O) (1975-1978)
14. Clorox Company (1975-1976)
15. Colonial Penn Group, Inc. (1973-1979)
16. Commercial Union Assurance Companies (1974-1975)
17. Connecticut Bank and Trust Company (1972)\*
18. Downe Publishing, Inc. (1972-1973)
19. Eastman Kodak Company (1973)\*
20. E.F. Hutton (1981-1984)
21. Edward D. Jones (1985-1987)
22. First Pennsylvania Banking and Trust Company (1971-1972; 1974-1975)\*
23. General Electric (via BBD&O 1977) (1982)
24. General Foods Corporation: the Jell-O and Kool-Aid divisions and various departments of the corporate product development division (1969-1972)\*
25. Geometric Data (1981)
26. International Air Transport Association (1973-1975)\*
27. International Harvester Credit Corporation (1973-1974)\*
28. International Harvester Company (1975)
29. IT&T Continental Baking Company (1972-1978;1982)
30. Lever Brothers Company (1971-1973)\*
31. Marriott Corp. (1982)
32. Modern Medicine (1970)\*
33. MRCA (1975-1987)
34. Pacific Bell (1981-1982)
35. Pepsi Cola (1981)
36. Pfizer Pharmaceuticals, Inc. (1975-)
37. Pillsbury (1975)
38. Pioneer Electronics of America (1978)
39. RCA Computer Division (1972)\*
40. Sears Roebuck & Company (1972-1973)\*
41. SEI Investments (1988-)
42. Singer (1973)
43. SmithKline and French (1971)\*
44. Snelling and Snelling, Inc. (1973-1974)
45. Sterling Drugs (1985-1986; 1990-1992)

46. Stroh Brewery Company (1970)\*
47. Sun Oil Company (1972)\*
48. Syntex Laboratories, Inc., (1976-1977)
49. Twentieth Century Fox (via the Data Group, Inc.) (1972)
50. UNICOM (1973)
51. U.S. Dept. of Commerce, Office of Telecommunications (1972)
52. The Wool Bureau, Inc. (1975)
53. Western Airlines (via BBD&O) (1979)

The research projects designed and conducted for these firms covered variety of consumer and industrial marketing problems including product positioning and market segmentation, new product development, generation and evaluation of new products, and promotional concepts. Projects with \* were conducted via Robinson Associates.

**F. Illustrative Marketing Research Program Evaluation and Redesign:**

1. IT&T Continental Baking: copy and concept testing, segmentation studies (1972-1978)
2. Brown and Williamson: copy and concept testing (1978-1979)
3. Colonial Penn: all aspects of research (1973-1980)
4. Pfizer Pharmaceuticals: image studies, new product selection models, etc. (1975-1990)
5. R.J. Reynolds Tobacco: new product development system (1979-1980)
6. Bristol Meyer Squibb: Redesign of the Marketing Research function and various research and modeling procedures (1999-)

**G. Illustrative Intra-Company Marketing Strategy (and Marketing Research) Workshops:**

1. American Medical International (1978)
2. Amoco Fabrics Co. (1984; 1988)
3. ARA (1983)
4. Asociacion Mexicana de Ejecutivos en Planeacion (1979)
5. Atlantic Richfield Company (1971)
6. AT&T (1972-1978)
7. Bank of East Asia (2005)
8. BBD&O (1974-1983)
9. Bell Atlantic (1983)
10. Bell Canada (1980)
11. Black and Decker (1981)
12. Bristol Myers Squibb (1998)
13. The Bunge Group (1982)
14. Campbell Soup (1972)
15. Career Futures, Inc. (1975)
16. Certain-Teed Corporation (1983)
17. The Clorox Company (1975)
18. Colonial Penn Group (1975-1980)
19. Computer Science Corporation (1975)
20. Contel (1989)
21. Daymon (2004)
22. Di Giorgio Corp (1980-1981)
23. Deutsche Bank (2004)
24. Edward D. Jones & Co. (1983)
25. E.F. Hutton (1979-)
26. Ethicon, Inc. (1979)
27. The Executive Forum (1979)
28. General Foods (1970)
29. Gray Advertising, Inc. (1977)
30. IBM – Applied Business Systems (1988)
31. International Harvester (1974-1975)
32. Intermountain Health Care, Inc. (1978)
33. ITT Water Technology Group (2004)

34. Li & Fung (2005)
35. Los Angeles Times (1993)
36. Machinist Publishing Co., Ltd., Japan (1977)
37. Miles Laboratories Ltd., Canada (1973)
38. MRCA (1978)
39. New York Telephone Company (1976)
40. Pfizer Pharmaceutical, Inc. (1975-1987)
41. Phillips Petroleum Company (1992-1993)
42. The Pillsbury Company (1976)
43. Rhodia, Brazil (1979)
44. Schlachman Research, U.K. (1975)
45. SEI Corporation (1990-)
46. SmithKline & French (1970)
47. Spectra-Physics (1983)
48. Standard & Poors (1998)
49. Syntex Laboratories, Inc. (1976)
50. 3M's Marketing Council (1986)
51. Tektronix, Inc. (1978)
52. Unilever, U.K. (1975)
53. Union Mutual (1981)
54. Wyeth International Ltd. (1980)
55. Xerox (1981)

#### **H. Selected International Consulting**

1. UNIG, Singapore, Business Strategy (2000)
2. Li & Fung, Hong Kong: Business Strategy (1998-)
3. Wickes, plc., UK: Marketing and business consulting (1988-1996)
4. Hakuhodo, Japan: Design of a 21<sup>st</sup> Century Advertising Agency (1993-1997)
5. McKinsey, Milan: New Developments in Marketing Strategy, Research, and Modeling (1988)
6. Sunstar, Japan: Marketing and Business Strategy (1985)
7. Bunge Group, Brazil: Marketing planning (1982-1986)
8. Meridian Group U.K.: Marketing and Business Strategy (1985-1986)
9. P.E. Consulting Group, South Africa: Strategic planning & Marketing Consulting and Conducting Executive Seminars (1982)
10. Bell Canada, Canada: Market Segmentation Study (1979-1981)
11. Cooperative de Seguros de Vida, Puerto Rico: Design of a marketing planning system (1980)
12. Discount Bank, Israel: Marketing planning (1980)
13. Bank Leumi Ltd., Israel: Marketing planning (1978)
14. Fuji electric, Japan: Design of a management planning process (1977)
15. Koor Industries, Israel: Designing and organizing the marketing function for the corporation's 34 companies (1968-1969)

#### **I. Consulting to Government Agencies**

1. FinCen/BENS project on Terrorist Financing, 2003-2004
2. U.S. AIR FORCE: Evaluation of the Air Force resource allocation procedure (1980-1981)
3. CANADIAN GOVERNMENT: Industry, Trade & Commerce Design and execution of a study for evaluation of the U.S. market potential for selected Canadian medical diagnostic and therapeutic products (1980-1981)
4. U.S. PATENT AND TRADEMARK OFFICE: Designing a strategic planning system (1981)
5. NASA: Evaluation of NASA's IAC's 1976 advertising campaign and recommendations for its future advertising and marketing strategy (1977)
6. ISRAEL DEFENSE MINISTRY: Analyze and evaluate the marketing system of the Administered Areas (Arab territory prior to the 6-Day War). The findings and recommendations of this study were submitted in classified report to the Israeli Defense Ministry (1968-1969)



**J. Consulting/Advising to Research Organizations**

1. Member of the advisory committee of the Diebold Institute study of the impact of public policy on entrepreneurial startup companies: the U.K. and U.S. in biotech and IT, 1998 -
2. Institute of Business and Economic Research, University of California, Berkeley. Consultant on the Coping Behavior (an empirical study of the consumer-technology interface) project, sponsored by the National R&D Assessment Program, NSF. (1976-1981)
3. Pennsylvania Science and Engineering Foundation, Temple University/Applied Communication Research, Inc. Research consultant for design, analysis, and evaluation of an NSF (Office of Science Information Services) sponsored project concerning the design and evaluation of experiments for the marketing of scientific and technical information services. (1974-1977)
4. EDUCOM: Inter-university Communications Council, Inc. Participant in an interdisciplinary seminar to identify and measure special interest audiences for public television. (1974)
5. The John and Mary R. Markle Foundation.
6. Participated in a workshop for design of "Quality Ratings of TV Programs." (1979)
7. Participated in the design of a study on special interest audiences. (1975)
8. Marketing Science Institute Consultant from February 1967 to December 1968. Conduct and plan research projects primarily in the areas of industrial buying behavior, advertising, and international marketing.
9. Marketing Science Institute U.S. Department of Agriculture Study Group on Marketing Performance Principle investigator, March-December 1968. Developed a model for the evaluation of the performance of the U.S. marketing system.
10. Management Science Center University of Pennsylvania Senior staff member September 1967 to July 1968. Engaged in the development of a marketing model for Anheuser-Busch.

## UNIVERSITY ACTIVITIES

### University of Pennsylvania, The Wharton School

#### **A. Program Development**

1. The Wharton Fellows platform including The Wharton Fellows program and the e-Curriculum R&D Initiatives. Initiator/Chair of the Committee that designed the new program platform and the e-Curriculum R&D Initiatives (1999-2000) and continued direction and reinvention of the program including its shift to the Wharton Fellows as a Decision Support Network (2001-). Wharton Fellows Master classes Dr. Wind designed and directed included:
  - November 27-December 2, 2000: Philadelphia
  - January 7-January 12, 2001: Silicon Valley
  - February 18-February 24, 2001: Barcelona
  - March 15-March 17, 2001: Philadelphia
  - May 6-May 12, 2001: Philadelphia, Wharton Fellow in e-Business
  - June 3-June 7, 2001: Barcelona
  - June 8-June 9, 2001: Helsinki
  - July 8-July 14, 2001: Silicon Valley
  - March 17-March 22, 2002: CEO Forum & Foundations I: Philadelphia
  - April 21-April 25, 2002: Foundations II: Silicon Valley/San Francisco
  - June 9-June 11, 2002: Munich
  - November 3-November 8, 2002: Foundations I: Philadelphia
  - January 5-January 9, 2003: Foundations II: San Francisco
  - September 7-September 9, 2003: Top Line Growth in Turbulent Times: Philadelphia
  - January 7-January 9, 2004: Success: What's Next?: Seattle
  - April 25-April 28, 2004: Milken & the Media: Los Angeles
  - June 1-June 8, 2004: Leveraging Japan: Tokyo; China: Transformation from the Inside: Shanghai
  - September 12-September 14, 2004: Toward a New Europe: Prague, Czech Republic
  - December 12-December 14, 2004: Merger, Acquisition and Renewal: New York
  - March 6-March 9, 2005: Market & Sourcing Opportunities in India: Mumbai & Bangalore, India
  - June 26-June 27, 2005: Working with Government, Washington D.C.
  - September 22-September 27, 2005: Design, Innovation and Strategy: Copenhagen/Milan
  - December 4-December 6, 2005: Opportunities in Latin America and the US Hispanic Markets: Miami
  - February 25-February 27, 2007: Doing Business in an Evolving World, Philadelphia
  - May 21-May 23, 2007: Globalization Revisited, Shanghai
  - October 14-October 16, 2007: The Next Big Thing, Silicon Valley
2. The MBA X-Functional Integration Initiative (2003-2005)
3. A number of Executive Development Programs including :
  - Winning in the Next Millennium: Strategies for Driving Change: Initiator and Director, December 1998.
  - Wharton on the New Reality of Business: Co-Academic Director with Bob Mittlestaedt, December 2001.
  - IDC's MBA @ Wharton Program, 2003-2004 and October 2007 (co-director with Ziv Katalan).
4. The Advanced Management Program (AMP) Design Team (1998).
5. Wharton's Information Management Initiatives (1998-1999). Founder and co-chair (with Paul Kleindorfer) of its faculty council.
6. The Revised MBA Curriculum (1990-1991). Chaired the committee that developed the new curriculum.
7. The SEI Center for Advanced Studies in Management, founding Director. Develop and direct all Center activities and chair its faculty council, 1988-.

8. The Joseph H. Lauder Institute of Management and International Studies, founding Director and chairman of its faculty council. Designed and directed all the Institute's programs, including the establishment of the Institute MBA/MA program which admitted its first class of 50 students in May 1984, February 1983-July 1988.
9. Wharton International Forum. Initiated and designed the original program and chairman of its faculty council, 1987-1998.
10. Wharton Ph.D. with M.A. in International Studies. Initiated the joint program, 1988.
11. Wharton Center for International Management Studies (renamed as the Wurster Center, 1988) founding director. Designed/directed all the Center's activities aimed at the stimulation of international research at Wharton and the internationalization of the faculty and programs, 1980-1983.
12. The Wharton/SIA (Security Industry Association) Marketing Program. Initiated and designed the program which held sessions on April 1982 and November 1982.
13. The Wharton Recanati Multinational Marketing and Management Program, Co-founder, 1978.
14. The Wharton Executive MBA (WEMBA) program, chaired the committee that developed the program, 1974.
15. Marketing Programs, participated in the redesign of the marketing MBA programs, 1970; Ph.D. 1971; and Undergraduate, 1973 and 1981; including the initiation of The Wharton Dual MBA Major in Marketing/Multinational Enterprise.

#### **B. Courses Developed and Taught**

- a. Developed (courses developed by me are indicated by an \*), modified and taught courses and seminars in:
  - Advertising Management (MBA)
  - Channel Management (MBA)
  - Communication Processes in Marketing\* (MBA)
  - Consumer Behavior\* (MBA and Ph.D.)
  - Creating an e-Business (MBA)\*[A binational e-course to Wharton and IDC students]
  - Creativity\* (MBA)
  - Health Care Marketing\* (MBA)
  - Industrial Marketing\* (MBA)
  - Integrating Marketing and Operations\* (MBA) [developed jointly with P. Kleindorfer]
  - International Marketing\* (MBA)
  - Marketing Management (MBA)
  - Marketing Methods and Applications for Business Consulting\* (MBA) [with P. Green]
  - Marketing Research (MBA and Evening School)
  - Marketing Strategy (WEMBA\*, MBA)
  - Multinational Management
  - Planning Marketing Strategy Projects (MBA)
  - Product Policy\* (MBA)
  - Promotion Policy (MBA)
  - Research Seminar (MBA and Undergraduate)
- b. Course head: MBA advanced study project (1967-1968, 1974-1979), Marketing Management for non-majors (1967-1968, 1970-1971), the MBA Core Marketing Management Course (1970-1971, 1971-1972), Marketing Strategy Seminar (1974-1975)
- c. Guest lecturer in various departments of the Wharton School including the Multinational Enterprise Unit, the Leonard Davis Institute of Health Economics, the Management Department, Management of the Arts Program, Decision Science, Public Policy and Management.

#### **C. Committee Responsibility:**

1. Marketing Department Committees:
  - 5 Year Plan Committee (chair), 2004-2005.
  - Initiator and Chair of a Committee to develop a marketing certification program, 2004-2005

- Recruiting/Personnel Committee, since 1971. Chairman Recruiting Committee, 1978-1979; 1981-1983; 1987-1988; Co-chair of the subcommittee for recruiting of STARS 2007- .
- Curriculum Committee, Member of Committee and Chairman of a number of its subcommittees 1967-1978, and 1996-1998. Chairman of the committee 1970-1971, 1973-1975, 1976-1978, and 1980.
- Ph.D. Program Coordinator, 1972-75. Doctoral Committee, 1988-1989.
- External Boards/Affairs Committee, 1987/88; Chair 1988-1989.
- Member and Chairman of various departmental Committees, including all the department's advisory committees since 1971, Marketing Fund Committee since 1983, and its Long Range Planning Committee, 1970-1971.
- Senior Faculty Recruiting, Chairman 1995-1997.

## 2. Wharton School Committees:

- Co-Chair, Search Committee for the new Director of the Lauder Institute (2006)
- Initiator and developer of *Wharton School Publishing* in conjunction with Pearson/FT, Founding Editor and member of the Faculty Editorial Board (2003-)
- Chairman, Dean's Committee on Cross-Functional Integration (2002-2004)
- Member of the Executive Development Faculty Advisory Board (2002-2004)
- Member of the Alfred West, Jr. Learning Lab Faculty Committee (2001-2005)
- Chairman of a Faculty Committee to assure cross program dissemination of e-Curriculum Developments (2000)
- Member of the Dean's Advisory Council (since its inception in 1983 to 2000)
- Member of the Strategic Planning Steering Committee, 1999-2000
- Member of the Committee to prepare the strategy for "Management, Leadership, and Organizational Priority" area of the University's Agenda for Excellence, 1998
- Senior Faculty Committee to Review the Global Presence strategy (Summer 1997)
- Chairman of the Graduate Curriculum Committee focusing on a critical examination of the MBA program and its appropriateness for preparing the leaders of the 21<sup>st</sup> century enterprises. The Committee developed the new MBA curriculum which was tested in 1991/1992 and 1992/1993 and which was fully implemented starting in 1993/1994.
- Initiated and organized the Management Education Council – the vehicle for corporate support and funding of the new MBA curriculum, 1992-
- The Wharton International Committee: Chairman, 1978-1981, 1982/1983, 1995-1997. [The 1995-1997 committee developed the Wharton globalization strategy.] Member: 1967-1968, 1983-1987, 1989-1991.
- Member of Boards of the following Wharton Centers:
  - The SEI Center for Advanced Studies in Management (Founder), 1988-
  - The Lauder Institute (Founder) 1983-
  - 
  - The Alfred West, Jr. Learning Lab (Initiator of the Lab and Founder of the External Advisory Committee), 2001-2005
  - Risk and Decision Process Center, 1984-
  - The Manufacturing and Logistics Forum, 1992-2000
  - The Wharton/PIMS Research Center (Co Founder), 1985-1998
  - U.S. Japan Management Studies Center, 1989-1992
  - Wharton Emerging Economics Program, 1992-1995
  - The Wharton Center of International Management Studies (Founder), 1981-1983
- Member of the Advisory Committee on Faculty Personnel, 1976-1978; 1984-1985; 1987-1989; 1994-1995.
- Dean's Planning Task Force (1986).
- Member of the School's Executive Education Policy Committee, 1987-1989.
- Member or chairman of a number of Chair Search Committees, including seven chairs in Marketing (1985, 1987, 1988-1990, 1992, and 1997), Entrepreneurship (1984-1985, 1997-1998), International Management (1984-1985), Operations Management (1986), the chair and director of the US-Japan Center (1988-1991), the chair in Managerial Economics (1989), the chair in Information Technology (1996-1997), and the chair in Electronic Commerce (1999).
- Member of the (ad hoc) Committees to Review Various Units and Departments:



The Snider Entrepreneurial Research Center, 2004-2005  
 Finance Department, 2001-2002  
 The Real Estate Center, 1988  
 Social Systems Science, 1985-1987  
 U.S. Japan Center, 1985-1986  
 Multinational Enterprise Unit, 1977-1978

- Member of the School's Faculty Personnel Committees of:  
 The Health Care Systems Unit, 1974-1975.  
 The Multinational Enterprise Unit, 1978-1979.
- Member of the Committee on Academic Freedom, 1977-1978.
- Chairman of the Advisory Committee for the Wharton Executive MBA Program, 1974-1975.
- Chairman of the Wharton School Doctoral Admissions Committee, 1974-1975.
- Graduate Academic Standards Committee, 1969/1970 – 1971-1972. Chairman of its subcommittee for the evaluation and redesign of the school's grading system.
- A number of Ad Hoc Committees and task forces for the:
  - development of a core Ph.D. Behavioral Science Course, 1972-1973,
  - redesign of the International Business program, 1971,
  - review of the Economic Offerings for Business and Applied Economic doctoral students, 1970-1971,
  - development of a Continuing Education Program in Health Care Administration, November 1971-October 1973.
- Evening School Committee, 1972-1973.
- Behavioral Lab Planning and Implementation Committee, 1989-1990.

#### **D. Doctoral Dissertations Supervised**

Bent Stidsen (1972); Yehoshua Buch (1972); Kathy Villani (1973); Rene Y. Darmon (1973); Arun K. Maheshwari (1973); Chris Hetzel (1973) winner of the AMA Doctoral Dissertation Competition; Arun K. Jain Honorable mention at the AMA Doctoral Dissertation Competition; Joel Huber (1974); Irwin D. Reid (1975); Chris Buss (1979) winner of the AMA Doctoral Dissertation Competition; Robert J. Thomas (1980) Winner of the Academy of Marketing Doctoral Dissertation Competition; Cynthia Fraser (1980); Joel Steckel (1981) Honorable Mention AMA Doctoral Dissertation Competition; John Deighton (1983); Rajeev Kohli (1984); Oliver Heil (1988); Kamel Jedidi (1988); Bari Harlam (1989); Kris Helsen (1990); Nino Buran (1991); Hoon Young Lee (1992); Rajeev K. Tyagi (1994); Amy Kallianpar (1998).

#### **E. Addresses to Alumni Club and Other Groups Regarding The Joseph H. Lauder Institute**

Illustrative addresses to alumni clubs and other groups on the changing needs for management education and the University's response – The Joseph H. Lauder Institute.

1. Alumni Clubs addressed include:
  - Dallas (December 1984)
  - Cleveland (April 1986)
  - Hong Kong (July 1985)
  - London (May 1984)
  - Long Island (January 1984, March 1986)
  - Milan (October 1987)
  - Philadelphia (January 1984, January 1986)
  - Paris (December 1983)
  - San Francisco (November 1983)
  - Taipei (July 1985)
  - Tokyo (June 1985)
  - Toronto (August 1987)
2. University Groups:
  - Board of Directors of the Association of Alumnae, March 1984
  - The Vice Provost Advisory Board, February 1984
  - Wharton Board of Overseers, January 1984, 1997
  - Trustees (October 1983, January 1984)

**3. Other Groups (partial list):**

- University of Pennsylvania Trustee Committee on Academic Policy (January 1988).
- 40<sup>th</sup> National Conference of the Council on International Education Exchange, San Francisco (November 1987)
- Title VI Center Lauder conference on International Studies and Foreign Language for Management. Philadelphia (May 1986)
- University of Pennsylvania Alumni (Alumni day, Philadelphia, May 1985)
- Delaware Valley Faculty Exchange Program on International Business and Language Studies (December 1984)
- AIESEC-Northeast regional conference (October 1984)
- Deans of 50 schools in an AACSB seminar on Internationalizing the Business Curriculum (March 1984)

**F. Illustrative presentations to alumni groups and others regarding the Management 2000 project, the SEI Center for Advanced Studies in Management, and the revised MBA curriculum**

- Wharton-Recanati Program, 1993
- International Forum, 1993
- Erasmus University – Faculty and Administration, 1993
- Marketing Advisory Board Meeting, 1993
- Board of Directors of the Wharton Alumni Association, September 1988; May, 1993
- The Wharton Board of Overseers, April 1988
- Wharton Advanced Management Program Participants, 1990, 1991
- The Wharton Graduate Advisory Board 1990
- Wharton's European Advisory Board 1991
- Alumni attending the May 1991 Alumni Reunions
- The SEI Center Board of Directors 1990-1991
- The Joseph H. Lauder Institute Board of Governors 1991
- College of Business Administration, University of Texas at Austin C Advisory Board and Faculty, February 1992
- INSEAD Faculty and Administration, February 1992
- Security Industry Institute, 40<sup>th</sup> Anniversary Program, Wharton, March 1992

**G. Illustrative presentations regarding Wharton's Globalization Strategy**

- Dean's Advisory Board, February 1997
- Wharton Board of Overseers, March 1997
- Wharton Graduate Executive Board, March 1997
- Wharton Executive Education Advisory Board, May 1997
- European Advisory Board 1997
- Wharton Faculty 1997

**H. Illustrative presentations regarding Wharton's Information Management Initiatives (IMI)**

- Dean's Faculty Lunch, April 1998
- All Wharton Departments 1998 – 2001
- The 1<sup>st</sup> Conference of the Wharton Alumni Club of Israel March 2001

**I. Illustrative presentations regarding Cross-Functional Integration of the MBA Curriculum**

- Wharton Faculty (Feb 2003)
- Graduate Executive Board (March 2003)
- CEO Panel for the entering 2004 class (August 2003)
- Ph.D. Proseminar (Fall 2003)

**J. Illustrative presentations regarding the Wharton Fellows Program**

- Wharton Executive Education Advisory Board (April 2004)
- Wharton Alumni Club of Atlanta (November 2001) and Israel (December 2001)

**K. Illustrative presentations regarding Wharton School Publishing**

- Wharton Executive Education Group (May 2006)
- Jay H. Baker Retailing Initiative Board (October 2005)
- Wharton Executive Education Group (January 2005; May 2006)
- Wharton School External Affairs group (February 2004)

**L. Illustrative presentations regarding The Power of Impossible Thinking**

- Alumni Leadership Conference, Hong Kong (May 2007)
- Wharton Connect: On Campus (March 2007)
- Wharton Connect (October 2006)
- Organizational Development Network of Greater NYC (October 2006)
- Staff Workshop (September 2006)
- LINKS @ Wharton (August 2006)
- The Wharton Club of New Jersey (July 2006)
- CEIBS @ Wharton (July 2006)
- Wharton Sports Business Initiative (May 2006)
- Microsoft's Latin America Financial Services CEO Roundtable (March 2006)
- LinkS@Wharton (November 2005; August 2006)
- Jay H. Baker Retailing Initiative Board (October 2005)
- Merrill Lynch, Investment Banking Institute at Wharton (August 2005)
- Wharton Fellows Event, Singapore (March 2005)
- EMTM Alumni Council (February 2005)
- Miami Wharton Club (December 2004)
- Advertising Research Foundation Breakthrough Conference (November 2004)
- Washington, D.C. Clubs of Wharton and AFLSE (September 2004)
- Deutsch Bank External Insights, New York (September 2004)
- Executive Briefing to Federal Express (September 2004)

**University of Pennsylvania – University Committees:**

- Member of the Institute for Strategic Threat Analysis & Response @ Penn (ISTAR) Advisory Board, 2007-
- Research Foundation Committee, Social Science and Management Review Panel, 1999-  
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- Member of the Faculty Advisory Group to Campus Development Planning Committee, 2005-2006
- Member of the Committee on International Programs, 2002-2006
- Member of The Ackoff Center Advisory Board, 2001-2006
- Member of the Provost Art and Culture Committee, 2002-2004
- Faculty Senate Committee on Administration, 1995-1998.
- Chair, Subcommittee of the Faculty Senate Committee on Faculty Teaching Evaluations, 1997-1998.
- Chairman of Special Presidential Committee on Borderless Education, 1997-1998.
- Provost's Task Force on the University of the Global Information Age, 1996-1997.
- Faculty Editorial Board, University of Pennsylvania Press, 1996-1997.
- Member of the Provost's Committee on Information Science and Technology, 1996-1997.
- Member of the Provost's Committee on Distance Learning, 1996-1997.
- Chairman of a new university committee focusing on innovative revenue generation, 1992/1993 and 1993/1994. Members include the President, Provost, Chairman of the Board of Trustees, 3 deans, 3 trustees, and 3 faculty members.
- Member of the Provost International Council, 1990-1992.  
Chairman of a Subcommittee for the Evaluation of the University Office of International Programs, 1990-1991 and of a Subcommittee to Evaluate the University's Off-Campus Programs, 1991-1992.
- Member of the Provost Task Force on International Programs (1992/1993; 1993/1994).

- Member of the Commission for the 250<sup>th</sup> Anniversary Celebration of University of Pennsylvania (1987-1990)
- Advisory Board of the PBS series on The Global Economy, 1990.
- University of Pennsylvania correspondent for PBS program on Geo-economy, moderated by Ted Koppel, May 1990.
- Chairman of the Faculty Council of the Joseph H. Lauder Institute, 1983-1988.
- Member of the Board of Directors of the Joseph H. Lauder Institute, 1983 to present.
- Member of the Advisory Board of the office of International Programs, 1980 to present.
- Chairman, the Wharton Dean Search Committee, (selected Russ Palmer) 1982/1983.
- The Senate Committee on the Economic Status of the Faculty, 1978/1979 (member); 1979/1980 (chairman).
- Member of the FAS – Wharton Committee, 1975-1977.
- Member of the University's Committee on Research, 1977/1978. Chairman of its subcommittee for evaluation of the University's Policy and Conduct of Research Programs.
- Member of the subcommittee of the University's Academic Planning Committee for the Measurement of Academic Performance, 1972/1973.

#### **The Interdisciplinary Center (IDC), Herzliya, Israel**

- Co-founder (1994)
- Chairman, International Academic Advisory Board, 1994-
- Faculty Appointment Committee: Chairman 1999-2005; Member 2005-
- Chairman, Higher Academic Council 1999-
- Delivered the first Graduation Address, October, 1998
- Delivered the first Zoltan Wind lecture, 1996
- Delivered the first graduation address of the Wharton IDC Marketing Communication Program, March 1999
- Occasional lectures in various courses, faculty seminars, and public addresses since 1995
- Founder of the American Friends of IDC 1998 and a Member of the Board, 2003-
- Designed the week-long programs at Wharton for its visiting MBA class (2002, 2003, and 2004) and the Zell Entrepreneurial Program, (2002)
- Member, Advisory Board of IDC's New School of Communication (2005-)

#### **Other Universities**

##### **1. Courses Taught**

- Erasmus University (The Netherlands) – A variety of courses on marketing strategy and marketing science (1993).
- University of Tokyo (Japan) – Marketing Science (1992).
- University of New South Wales (Australia) – Doctoral Seminar in Marketing (1977).
- University of California at Berkeley – Product Policy, Doctoral Seminar (1975).
- University of Tel Aviv (Israel) – Consumer Behavior, Marketing Seminar (1968).

##### **2. Faculty Promotion Review – Illustrative Universities**

Columbia University, Harvard University, Massachusetts Institute of Technology, New York University, Pennsylvania State University, Stanford University, Tel Aviv University, University of California at Los Angeles and at Berkeley, University of Chicago, University of Georgia, University of Illinois, University of Pittsburgh, University of Rochester, University of Southern California, University of Texas, Yale, and others.

##### **3. Program/School Review**

- Indian School of Business – Organization of the Wharton Planning Meeting, April 2002.
- Rice University – member of the external review committee, 1996.
- University of Santa Clara – member of a Site Review Team for the evaluation of the school's marketing department, 1981.
- University of Tel Aviv – Initiator and organizer of the school's faculty colloquium, working paper series, planned and organized a number of the school's executive development programs and various other activities, 1968/1969.



- The Technion, Israel Institute of Technology – Outside examiner at the Graduate Division of the Technion – The Israel Institute of Technology, Haifa, 1969.

## OTHER PROFESSIONAL ACTIVITIES

### A. Development of Research Programs [Illustrative List]

1. SEI Center project Toward a New Theory of the Firm (2004- )
2. The Future of Advertising (2007- )
3. SEI Center project with Business Executives for National Security and FINCEN using the Suspicious Activity Reporting System (SARS) for identifying terrorist financing (2003-2004)
4. SEI Center project, Assessing the True Value of the Firm, Co-Directed with David Larcker (2002-2003)
5. The Wharton Office of Homeland Security (OHS) Project, Economic Vulnerability to Terrorism: Assessment, Prioritization and Action Implications, Co-Directed with Paul Kleindorfer (2001-2002)
6. Digital Transformation Project in Collaboration with McKinsey, WeBI and the Fishman-Davidson Center for Service and Operations Management (2001-)
7. e-Curriculum R&D Initiatives (2000-2002) and Curriculum R&D for the Wharton Fellows Decision Support Network (2001-)
8. The SEI Center's research program on Creating a 21<sup>st</sup> Century Enterprise. (1990-)
9. Established the Value of Marketing program. (1993-1997)
10. Initiated (with Frank Bass) the Empirical Generalizations in Marketing program. (1993-1995)
11. Co-founded (with Greg Farrington) the Virtual University Lab program (1995-1997)
12. Initiated the Computers and Art program for the ENIAC at 50 celebration (1998-1999)
13. Co-developed (with Bob Holland) the SEI Center's George Harvey Program on Value Creation Through Diversity (1996-)
14. Co-founded (with Paul Kleindorfer) the Information Management Initiatives Research Program (1998-1999)

### B. Editorial Activities

1. Founding editor, Wharton School Publishing, 2003- [published books are listed on pages 24-26]
2. Initiator and editor of *Advances in Marketing Research and Modeling: Progress and Prospects – A Tribute to Paul E. Green*, Kluwer Academic Publishers, 2002.
3. Initiator and editor of *The Wharton School Publishing Newsletter* (monthly since July 2005)
4. Initiator and Co-Editor of the *Wharton Fellows Newsletter* (quarterly 2003-4; monthly January-December 2005).
5. Initiator and editor of *Wharton Executive Library* (published by Oxford University Press), 1984-1987. The series was aimed at familiarizing top management with recent developments in the various management disciplines. Books published include:
  - Gerard Adams, *The Business Forecasting Revolution, Nation-Industry-Firm*, 1986.
  - Leonard M. Lodish, *The Advertising and Promotion Challenge, Vaguely Right or Precisely Wrong?*, 1986.
  - David Solomons, *Making Accounting Policy: The Quest for Credibility in Financial Reporting*, 1986
  - James C. Emery, *Management Information Systems: The Critical Strategic Resource*, 1987.
6. Initiator and editor of the Scientific Press *Computer Based Marketing Series*. 1984-90. The series offers short books on specialized marketing topics with accompanying PC software. Books published include:
  - Paul E. Green, *CAPPA Electronic Questionnaire Display and Analysis*, 1986
  - Gary Lilien, *Marketing Mix Analysis with Lotus 1-2-3*, 1987
  - John Hauser, *Applying Marketing Management: Four PC Simulations*, 1987
  - Darral G. Clarke, *Marketing Analysis and Decision Making: Text and Cases with Lotus 1-2-3*, 1987.
  - Gary Lilien, *Marketing Management: Analytical Exercise with Lotus 1-2-3*, 1988.

7. Editor-in-Chief, *The Journal of Marketing* 1978-1981 (Vol. 43-45)
8. Area Editor, *Marketing Science*, 1981-83 (Vol. 1-2); occasional Area Editor (2002-)
9. Advisory Editor of the Addison-Wesley Marketing Series, 1974-1981. Books published under my editorship include:
  - G. David Hughes, *Marketing Management*, 1978.
  - James Bettman, *An Information Processing Theory of Consumer Choice*, 1979.
  - Richard N. Cardozo, *Product Policy: Cases & Concepts*, 1979.
  - F.E. Brown, *Marketing Research: A Structure for Decision Making*, 1980.
10. Member of the Editorial Boards of:
  - *Journal of Business to Business Marketing*, 2004
  - *Journal of Interactive Marketing*, 1998-
  - *Journal of Global Marketing*, 1986-
  - *Journal of Product Innovation Management*, 1982-

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  - *Annual Review of Marketing*, 1980-1982
  - *Computer Operations*, 1968-1970
  - *Journal of Business Research*, 1974-1977
  - *Journal of Consumer Research*, 1973-1984
  - *Journal of High Technology Management and Market Research*, 1988
  - *Journal of Marketing Research*, 1978-1981
  - *Journal of Marketing*, 1971-1978
  - *Journal of Organizational Behavior and Statistics*, 1983
  - *Journal of Pricing Management*, 1989
  - *Journal of Segmentation in Marketing*, 1997
11. Occasional reviewer for:
  - *Decision Sciences*
  - *IEEE Transactions on Engineering Management*
  - *Journal of Management Studies*
  - *Journal of Marketing*
  - *Management Science*
  - *Marketing Science*
  - *Operations Research*
  - *Public Opinion Quarterly*
  - *R&D Management*
  - *The Journal of Economics and Business*
  - *The Wharton Quarterly*
12. Screening editor, *Journal of Consumer Research*, 1973-1974.
13. A judge of competitive research papers submitted to the National Conference of The AMA Academic (August) Conference in - Minnesota (1971), Houston (1972), Washington (1973), Portland (1974), Rochester (1975), Memphis (1976), Chicago (1980), Chicago (1984).
14. A judge of Ph.D. dissertations submitted to the AMA Doctoral Dissertation Competition, 1974, 1976, 1977, 1981, 1982, 1983. And the MSI Dissertation, and other award competitions 1984, 1985, 1990
15. Reviewer of papers submitted to the Market Measurement and Analysis Conference (renamed Marketing Science Conference) since 1981.
16. Occasional reviewer of applications for research grants for the Social Science Research

Council (London, England) since 1972; and the National Science Foundation, Division of Science Information and Advanced Productivity Research and Technology, since 1977.

17. Reviewer of manuscripts for a number of publishers and universities, including the MacMillan Company, the Center for Research of the College of Business Administration of Pennsylvania State University, the Graduate School of Business, Columbia University, Prentice Hall, Jose Bass and others.

#### **C. Offices Held in Professional Associations**

##### **AMA**

1. Member of the Board of Directors, The Philadelphia Chapter of the AMA, 1979-1983.
2. Program Chairman of:
  - a) The 1977 AMA Doctoral Consortium Philadelphia, August 1977.
  - b) The 1975/1976 AMA Attitude Research Conference, Hilton Head, SC, February 1976.
  - c) The National Educators AMA Conference, Washington, D.C., August 1973.
3. Member of a number of AMA councils including the Advisory Council of the National Marketing Honorary Society of the AMA - Alpha Mu Alpha, 1980/1981 and the Educational Policy Council, 1977/1978.

##### **TIMS**

1. Chairman, 1974/1975; Chairman Elect, 1973/1974; and Vice Chairman, 1971/1972 of the Institute of Management Science College of Marketing.
2. Program Chairman of:
  - a) Marketing track on "Marketing Science for Increased Competitiveness of Firms and Countries," 1988 Washington, D.C., TIMS/ORSA Conference.
  - b) The 1981 Market Measurement and Analysis Conference (with Vijay Mahajan).
  - c) The Delaware Valley Chapter, 1967/1968.
3. Member of the Program Committees of the Market Measurement and Analysis Conference: University of Texas, 1980; New York University, 1981; and the Marketing Science Conference: University of Chicago, 1983; Vanderbilt University, 1985; University of Texas at Dallas, 1986; Centre HEC-ISA, Jouy-en-Josas, France, 1987; Washington University, 1988.
4. Member of the Advisory Board of Marketing Science, 1983-

##### **IAM – The International Academy of Management**

1. Chancellor, 2000-2006.
2. Vice Chancellor for the Americas, 1995-2000.
3. Program chairman, the Americas Conference, 1994, 1998.

##### **MSI – Marketing Science Institute**

1. Chair of a task force on e-business evaluation (part of the Metrics program), 1999.
2. Academic Trustee (1989-1995).
3. Member of the Academic Advisory Council (1983-1987).
4. Member of a number of steering groups, including
  - Marketing Strategies Steering Group, 1983-1987.
  - The International Advisory Steering Committee (1985-1987).
  - Information Technology Steering Committee (1990-1992).



**Other**

1. The Diebold Institute Entrepreneurship and Public Policy Project, Committee of Advisors (1999- ).
2. World Management Council. Member of the Academic Advisory Board (1988–1989).
3. Member of the interdisciplinary task force (organized by AMA) for the design of the *Journal of Consumer Research*, (October 1971–July 1972). Founding member of the Policy Board of the *Journal of Consumer Research* (1972–1983); Chairman of the Board (1977–1978); Chairman of the 1976 and 1981 Editor Search Committees.
4. Member of the Philadelphia's International City Steering Committee (1983–1985, 1987–1988).
5. Member of the Publication Committee of AAPOR (1973-1974).
6. Member of Program Committee of 1979 ACR Conference.

**D. Planning and Organizing Professional Programs at the University**

1. Chair, "Network-Based Strategies and Competencies," a joint project with INSEAD co-directed with Paul Kleindorfer, Initial Workshop – May 3, 2007.
2. Chair, "The Future of Advertising," a joint project with the ARF, Workshop, March 30, 2007.
3. Initiated and chaired a task force to develop a Marketing Certification Program (2003- )
4. Co-Designed with Bob Mittelstaedt an executive education program on "Wharton on the New Reality of Business," December 2001 [including the design of the "Wharton Post 9/11 Business Scenario" (October 2001-)] and May 2002.
5. Designed and directed the executive programs, "Winning in the Next Millenium," December 1998.
6. Initiated "The Impact of Computers and Information Technology on Management: 1946, 1996, 2001," May 13-14, 1996 program for the ENIAC at 50 celebration (1994- ).
7. Initiated the "Computers and Art" program for the ENIAC at 50 celebration (1994- ).
8. Participated in the original design of the Wharton – AT&T Marketing Management Program. Taught in the 1973, 1975 -1980 programs.
9. Developed, organized and taught a Marketing Research Seminar for U.P. Clinical Scholars Group (February–May 1975 and February–April 1976).
10. Planned and taught the marketing management section of a number of advanced management programs of the University of Pennsylvania:
  - Dean Witter - Wharton Account Executive Program, 1986.
  - Securities Industry Association Program, annually since 1982.
  - Advanced Management Program for Overseas Bankers, 1975, 1976.
  - Program for Health Care Executives, 1973, 1975, 1982.
11. Participated in various executive development programs of the Marketing Department of the University of Pennsylvania:
  - Marketing for the Postal Service, 1983.
  - Marketing Strategy Seminar, since 1981 (January & May).
  - Pharmaceutical Advertising Council, 1980/1981.
  - Wharton Salesforce Management Seminar, since 1980 (January & May).
  - Dixie/Marathon (American Can Company), May 1977.
  - Marketing Research Seminar 1977-1983.
  - General Building Contracting Association, Inc., January 1977.
  - Center de Promotion du Commerce International, Chambre de Commerce et d'Industrie de Nantes, 1976, 1978-1980.
12. Planned and taught (with Thomas Robertson) a number of seminars on Health Care Marketing for:
  - The Virginia Hospital Association, February 1978.
  - The New York Management Center, September and November 1977.
  - The Wharton School's Lifelong Education Program, October 1976.
13. Co-founder, organizer of the Wharton teaching component, and frequent lecturer in the Wharton/Israel Binational Marketing Management Program [The Consulting Practicum] 1979-1995.

**E. Award Committees**

1. Member of the Parlin Board of Governors, 1978-1983, 1995- ; Chairman of the Board, 1980/1981.
2. Member of the selection committee for MIT's Sloan Management Review/Price-Waterhouse Company, 2003 – Best Article Award.
3. Nominator for the Marketing Communications Award of the World Technology Network, 2002- .
4. Initiator of the Lauder Institute Award for the Research Paper that Best Advances the Theory & Practice of International Management Science. Administered by TIMS and Chairman of the first award, 1989.
5. Member of the W. Arthur Cullman Executive Award Selection Committee (Ohio State University), 1985- .
6. Member of a panel of judges for the evaluation of nominees for the Paul D. Converse Awards for Outstanding Contributions to the Development of Theory and Science in Marketing, 1974, 1977, 1981, and 1986.

**F. Planning and Organizing Professional Programs Outside the University**

1. KMDC Program, Kuala Lumpur, The Power of Impossible Thinking and Its Implications for Marketing Innovations, March 15-16, 2005.
2. Co-director (with Hotaka Katahira) of the Marunouchi Global Center Management Program, 2002.
3. Planned and taught a number of two-day seminars on "Recent Developments in Marketing Research Methodology" for:
  - The Management Center, University of Bradford, February 1975 and May 1976.
  - The University of Laval, Canada, November 1973.
  - The University of Social Sciences at Grenoble, France with (Paul E. Green), May 1973.
4. Planned and taught various AT&T Executive Development Seminars on:
  - "Multivariate Analysis in Marketing," March and August 1975.
  - "Market Analysis," December 1974, and June 1975.
  - "Market Segmentation," September 1974, November 1975 and March 1976.
  - "How to get the Most Out of Your Marketing Research," Spring 1974.
  - "Consumer Behavior," October 1972, January 1978.
5. Planned and taught two one-day executive seminars on Conjoint Analysis and New Product Policy at the University of New South Wales (Australia), June 1977.
6. Planned and taught a number of executive seminars at the University of Tel Aviv: Marketing Strategy (1969); Product Policy (1977); Marketing and Corporate Strategy (1978, 1980); New Development in Product and Marketing Research (1980).
7. Planned and taught the marketing research section of the Bank Marketing Program of the Graduate School of Bank Marketing, April 1977.
8. Planned and taught a series of two-day seminars on Marketing Strategy for the New York Telephone Company, February and April 1976.
9. Initiated, planned and organized a number of two day workshops on:
  - Concept Testing, University of Pennsylvania, March 1972.
  - Industrial Buying Behavior (with Frederick E. Webster and Richard N. Cardozo), sponsored by the AMA & the University of California at Berkeley, April 1971.

- Research Utilization, (with Steve Greyser and Randy Batsell), sponsored by the AMA and MSI, April 1979.
  - Advances and Applications in New Product Forecasting: Innovation Diffusion Models (with Vijay Mahajan) sponsored by MSI, October 1983.
10. Organizer and chairman of various sessions at annual conferences of various professional associations (illustrative list):
- "Marketing science: Accomplishments and challenges in the global information age," plenary session at Informs, Philadelphia, November 1999.
  - "Consumer Labs," Marketing Science Conference, March 1997.
  - "Global Marketing Strategy," 1991 ORSA/TIMS Meeting
  - "Creation of Innovative Marketing Knowledge: An Interdisciplinary Perspective," 1989 AMA Marketing Educators Conference, August 1989.
  - Strategic Alliances," TIMS Osaka, Japan, July 1989.
  - "Industrial and New Technologies Marketing: Lessons from Industry," International Research Seminar in Marketing, La Londe les Maures, France, May 1989.
  - "New Product Development Models," ORSA/TIMS, San Diego, October 1982.
  - "Product/Market Portfolio Models," ORSA/TIMS, Colorado Springs, November 1980.
  - "The Role of Multivariate Analysis in Consumer Research," APA, Toronto, 1978.
  - "Applications of Management Science to Market Segmentation," TIMS, Miami, 1976.
  - "Recent Developments in Management Science Application in Marketing," TIMS, Las Vegas, 1975.
  - "Multidimensional Scaling and Conjoint Measurement in the Study of Multidimensional Psychophysics," ACR, Boston 1973.
  - "Implementation of Management Science in Marketing," TIMS, Houston 1972.
  - "On the Teaching of Consumer Behavior," AMA, Houston, 1972.
  - "Family and Industrial Buying Behavior," AMA, Minneapolis, 1971.
  - "Multidimensional Scaling in the Study of Consumer Behavior," ACR, 1970.
11. Planned, organized and taught a Marketing Management Program for the top executives of the Union of Cooperative Societies (Israel), April to July 1969.
12. Planned and taught marketing courses at a Graduate Program for Marketing Consultants at the Israel Institute of Productivity, September 1968 to January 1969.
13. Academic advisor to a number of organizations engaged in Management Training in Israel. Primarily the Israel Institute of Productivity, and the Technion Research and Development Foundation Ltds., January to August 1969.

#### G. Lecturing

##### **Illustrative Keynote Addresses** at various conferences including:

- "The Power of Impossible Thinking," Opening Session: Transform Your Business with New Thinking and New Models, The 51<sup>st</sup> Annual ARF Convention, Research Powered Marketing: New Models for Growth, April 2005.
- "The Power of Impossible Thinking," A Wharton Fellows Dinner Event, Kuala Lumpur, March 2005.
- "The Power of Impossible Thinking in Meeting the Jim Stargel Challenge," ARF Breakthrough Conference, November 4, 2004.
- "Should We Challenge Our Mental Models for Building Better Brands?" Med Ad News Conference on Building Better Brands, Philadelphia, July 28, 2004.
- "The Changing Nature of Marketing: Implications for Research, Teaching, and Practice," The Elsevier Science Distinguished Scholar Award Lecture at the Society for Marketing Advances, November 6, 2003, New Orleans.
- "The Challenge of Corporate Governance," IAM Conference, Barcelona, Fall 2003.
- "Corporate Transformation: Lessons for Japan," Marunouchi Global Center First Executive Program, November 2002.

- "Convergence Marketing: The Challenge for the On-Demand Era," IBM's 2002 WW Summit for the On-Demand Era, 2002.
- "Leading Transformation Lessons for Mexico," TeleTech's Top Executive Program, October 2002.
- "Disruptive Technology—Rethinking Your Mental Models," Forbes Global CEO Conference, Singapore, September 19-21, 2001.
- "e-Business: The Lessons to Date and Implication to Management Practice, Research and Education," opening lecture of the PriceWaterhouseCoopers Management Consultants e-Bus Chair at the Graduate School of Business Studies at Katholieke Universiteit Leuven, Belgium, February 2001.
- "Reinventing Training for the Global Information Age," Delphi e-Learning Summit, Phoenix, AZ, January 2001.
- "Customerization: The New Management Challenge," The President's Forum of the Interdisciplinary Center in Herzliya, Israel, September 2000.
- "e-Transforming an 'Old Economy' Business," Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- "Creating a University for the Global Information Age," The Inaugural Lecture of the Wharton-Singapore Management University, July 2000.
- "Implications of the New e-Business Environment and Models for Management Research and Education," International Academy of Management, Barcelona Meeting, March 2000.
- "New Trends in Marketing Research," IDC, Herzliya, March 2000.
- "Reinventing the Business School for the Global Information Age," plenary session, The EFMD Deans and Directors Meeting 2000, Helsinki, Finland, January 2000.
- "Digital Marketing: Implication for the Future of Marketing Management Research and Research in Marketing," plenary session presentation AMA Marketing in the 21<sup>st</sup> Century, San Francisco, August 1999.
- "Towards a New Marketing Paradigm," AMA Winter Marketing Educators' Conference, February 1998.
- "Creating a 21st Century Enterprise: Implications for Marketing Practice, Research and Education," Keynote Address, 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
- "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," P.A.C. Pharmaceutical Meeting: New Thinking, New Customers. February 28, 1995.
- "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
- "AHP in Top Management Decisions," The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
- Neuhauf Lecture, "The Impact of Marketing Science on Industry and Academia: Applications, Results and Lessons," at Rice University, March 23, 1994.
- Third Workshop on Marketing and Competitive Advantages with Ambrosetti Group, Milan on "The Customer Driven Company: From Concept to Reality," November 27-28, 1992.
- Amoco Fabrics and Fibers Co-Leadership Council, address on "What a Difference a Difference Can Make," May 1988.
- A special meeting of the Chinese Management Association and the Taiwan Ministry of Trade, address on "Marketing to the U.S." (Taipei), July 1985.
- MRCA Conference on "The Affluent Market: New Data and Methodologies in Financial Services Planning," November 1984.
- The 1983 ESOMAR congress August 1983 at Barcelona. Keynote address on "The contribution of Research to Product Management and New Product Development.
- The 1983 Research and Planning Conference of the Bank Marketing Association. Keynote address on the Integration of Marketing into Strategic Planning," April 1983.
- The 1982 AMA Faculty Consortium on "Industrial Marketing and the Changing Environment." Ohio State University, July 1982.
- S.F. Chapter of the AMA, address on "Increasing Marketing Productivity, March 1982.
- Philadelphia Chapter of the AMA, Conference on Market Segmentation, January 1981.



- The First Delaware Valley Meeting of the Product Development and Management Association (PDMA), December 1980.
- AMA International Conference Workshop, Philadelphia, June 1978.
- National Agricultural Marketing Association, Philadelphia, March 1977 and February 1978.
- Marketing Planning Conference, The AMA Western Michigan Chapter, Grand Rapids, March 1976.
- The 11th Annual "New Horizons in Science," Conference of the Council for the Advancement of Science Writing, New York, November 1973.

**Presented papers at various national conferences of the American Marketing Association,** December 1967; June and August 1968; August 1969; August 1970; June and August 1974; April and August 1975; August 1976; August 1977; June and August 1978; June and August 1979; June and August 1980; August 1981-1990, March 1990, August 1991; August 1991, April 1993; February & August 1994, August 1995, August 1996, August 1997, February 1998, August 1999.

**Speaker in various conferences and workshops of:**

- Association for Consumer Research (ACR), 1968, 1970/1973, 1975, 1977, 1984.
- The Institute of Management Science (TIMS), 1969, 1972, 1974-1978, 1980- .
- American Institute of Decision Sciences (AIDS), 1974, 1976.
- American Association of Public Opinion Research (AAPOR), 1974/1975.
- American Psychological Association (APA) DIV 23, 1978.
- American Statistical Association (ASA), 1978.
- AMA Philadelphia Chapter, 1980/1981.
- Annual Conference of the Strategic Management Society, 1984.
- Annual Conference of the Pharmaceutical Marketing Research Group (PMRG), 1986, 1987.
- Annual Conference of the World Future Society Assembly, Washington, D.C., 1993.

**Speaker in a number of the AMA Attitude Research Conferences,** 1967, 1971, 1973, 1976, 1987.

**Member of the Faculty of the AMA Doctoral Consortiums**

- University of Colorado, 1996
- University of Santa Clara, 1994
- University of Southern California, 1991
- New York University, 1987
- University of Notre Dame, 1986
- University of Michigan, 1983
- University of Minnesota, 1982
- Pennsylvania State University, 1980
- University of Maryland, 1981
- University of Wisconsin, 1979
- University of Chicago, 1978
- University of Pennsylvania, August 1977
- University of Texas, August 1976
- University of Illinois, September 1971

**Member of the AMA Faculty Consortium, Chicago 1997**

**Illustrative papers delivered in various professional workshops**

- Applications of Multidimensional Scaling to Marketing and Business, sponsored by the University of Pennsylvania and Bell Laboratories, June 1972.
- Planning Data for STI Managers, Sponsored by NSF office of Science and Information, December 1976.

- Synthesis of Knowledge of Consumer Behavior, sponsored by the RANN Program National Science Foundation, April 1975.
- Multinational Product Management, sponsored by the Marketing Science Institute and the AMA International Marketing Division, January 1976.
- Consumer and Industrial Buying Behavior, sponsored by the University of South Carolina, March 1976.
- Organizational Buying Behavior, sponsored by the University of Pittsburgh, April 1976.
- Consumer Research for Consumer Policy, sponsored by the MIT Center for Policy Alternatives, July 1977.
- Analytical Approach to Product-Marketing Planning, sponsored by the AMA and MSI, University of Pittsburgh, November 1977, October 1981.
- Interfaces Between Marketing and Economics, sponsored by the University of Rochester, 1978, 1983.
- Industrial Marketing, Penn State University, May 1982.
- Market Measurement and Analysis, renamed Marketing Science Conference sponsored by ORSA/TIMS:
  - Centre HEC-ISA, Jouy-en-Josas, France, 1987.
  - University of Texas at Dallas, 1986
  - Vanderbilt University, 1985
  - University of Chicago, 1984
  - University of Southern California, 1983
  - Wharton, March 1982
  - New York University, March 1981
  - University of Texas, Austin, March 1980
  - Stanford University, March 1979

**Illustrative addresses at various top management conferences and meetings in the U.S. and abroad:**

- "Getting More with Less," Telenet CEO Strategy Review, June 19-20, 2006.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "The Changing Nature of Corporations: Competing in a Flat World," organizer and chair of a panel at the Milken Institute Global Conference, April 2006.
- "Challenging Your Mental Models," Microsoft's Latin America Financial Services CEO Roundtable, March 2006.
- "Brand Names and Logos," Penn Humanities Forum on Word and Image, February 2006.
- "New Frontiers in the Practice of Management" with Paul Kleindorfer, CEO Workshops at IDC Israel, January 2006.
- "Strategic Trends on the Global Marketplace," The Sixth Herzliya Conference on The Balance of Israel's National Security, January 2006.
- "Recent Developments in Marketing and Branding Strategies," presented to the Board and top management of IDT HK, August 2005.
- "Tapping Opportunity in the Developing World: Innovative Solutions for Companies and Communities," Milken Institute Global Conference, April 2005.
- "Return on Marketing Investment: Progress, Problem, and Prospects," Council of Marketing Executives, The Conference Board, October 6, 2004.
- "The Power of Impossible Thinking: A Prerequisite for Profitable Growth," Milken Institute Global Conference, April 27, 2004.
- "The Transformation Challenge," YPO at SEI, March 2004.
- "Technology for Profitable Growth: Progress, Problems, and Prosperity," eBRC Board of Directors meeting, Philadelphia, May 2003.
- "Business and the Pending Wars," a global senior executive Web conference, February 2003.
- "e-Business Revolution: R2R (Return to Reality)," World Leadership Forum of the Foreign Policy Association, New York, September 2000.
- "UNIG Top Executive Forum," Singapore, August 2000.
- "The Future of the Marketing Organization," MSI Board of Trustees Meeting, April 2000.

- "Preparing for 2002: Creating a Leading Global Medical Communication Company for the 21<sup>st</sup> Century," Top Management of Medius Group Int. Paris, May 1997.
- "The Next Enterprise: Creating a Successful 21<sup>st</sup> Century Enterprise," The Hong Kong Management Association, January 1996.
- "Building the 21st Century Corporation Today: A Marketing Perspective," A one day session for CEOs who participate in the MASTERSHIP program (LA) January 1990.
- "Growth Outlook for Consumer Products and Services" to the policy committee of Anheuser-Busch Company, 1986.
- "Marketing Management in Securities Firms" SIA Regional conference, 1986.
- "Recent Developments in Marketing Strategy," to Dutch top executives by Horringa & DeKoning, October 1986.
- A number of 1-day Top Management Seminars organized by Studio Ambrosetti (Italy)
  - Developing and Launching New Products (1986)
  - Marketing and Corporate Strategy (1987)
  - Marketing for Financial Institutions (1987)
  - Domestic and International New Business Entry Strategies 1988)
  - Strategic Marketing and New Product Development (1989)
  - How to Develop Products More Often and Get Them to Market Faster (1991)
  - The Consumer Goods Scenario: The Challenge (1992)
  - Marketing Driven Bus Strategy in the Global Information Age (2000)
- "The Challenge of Marketing" Board of directors and top management of Grand Metropolitan, 1985.
- "Advances in marketing and Business Strategies" Top management group of the John Fluke Manufacture Co., 1985.
- "Global Marketing Strategies" YPO Chapter of Hong Kong, 1985.
- "Marketing for Hospitals" Hospital presidents program of the J&J Leonard Davis Institute program, 1985.
- "Global Marketing Strategies" Top executive group of MARS pet food business, 1984.
- "Marketing for the Evolving Company" Conference on "Financing & Managing the Evolving Company" sponsored by Arthur Andersen & Co. and the GSB University of Texas at Austin, April 1984.

**Illustrative Other Top Management groups addressed:**

- MSI Trustees, Cambridge, Massachusetts, October 1983.
- Securities Industry Association Fall Meeting, N.Y., October 1982, Spring Meeting, April 2000, Homestead, Virginia, May 1982: keynote speaker.
- Three sessions at the 1979 YPO Central Area Conference, Williamsburg, October 1979.
- Two sessions at the YPO International University, Rio de Janeiro, May 1979.
- Two sessions at the 1978 YPO, Eastern/Northeastern Area Conference, Sea Island, Georgia, November 1978.
- Eastern Pennsylvania Chapter of YPO, October 1978.
- Two-day seminars for top executives of Latin American countries sponsored by Expansion Publishing Group, Mexico City, June 1978, (Marketing Strategy); June 1979 (the Marketing Audit); and December 1980 (Marketing for Top Executives).

**Guest lecturer at faculty research seminars and executive development programs of various universities and research institutes, including:**

Bell Laboratories (Applied Statistics Area), 1978  
 Columbia University, 1974, 1976-1978  
 Drexel University, 1977, 1984  
 Erasmus University, The Netherlands, 1993  
 Escola de Administrao de Empresas de Sao Paulo, Brazil, 1979  
 European Institute for Advanced Studies in Management, Brussels 1981  
 Florida Atlantic University, 1972  
 Harvard University, 1981

IESE Universidad de Navarra, 1999  
 Indian Institute of Technology (IIT) Bombay, 1989  
 INSEAD, France, 1992, 2000  
 Institut Supérieur des Sciences Economiques et Commerciales, Paris, 1981  
 Interdisciplinary Center Herzliya, 1996, 1997, 1998, 1999, 2000  
 Kôc University, Turkey, 2000  
 Laval University, Canada, 1973  
 Katholieke Universiteit, Leuven, 2001  
 Monash University, Australia, 1977  
 Nanzan University, Nagoya, Japan, 1977  
 New York University, 1979, 1984  
 Northwestern University, 1980  
 Norwegian School of Management, Norway, 1993  
 Pennsylvania State University, 1978  
 Southern Methodist University, Texas, 1982, 1984, 1986  
 Stanford University, 1976, 1982  
 State University of New York at Buffalo, 1975  
 University of Bradford, 1975-1976  
 University of California at Berkeley, 1975  
 University of California at Los Angeles, 1976, 1980, 1990  
 University of Capetown, S.A., 1982  
 University of Chicago, 1981  
 University of Groningen, 1986  
 University of Houston, 1977  
 University of Illinois, 1985  
 University of Iowa, 1971  
 University of Minnesota, 1973  
 University of New South Wales, Australia, 1977  
 University of Ottawa, 1974  
 University of Pittsburgh, 1988  
 University of Social Sciences, Grenoble, France, 1973  
 University of Southern California, 1979  
 University of Tel Aviv, 1977-1980, 1982  
 University of Texas at Austin, 1984, 1997  
 University of Tokyo, Japan, 1992, 1993, 1995, 1997  
 University of Washington, 1979  
 Yale University, 1982

**Speaker at various executive programs of the University of Pennsylvania (illustrative list):**

- "Leadership Challenges in the Pharmaceutical Industry," TEVA Israel *Leading Your Business*, June 28, 2007.
- "Challenging Your Mental Models," Estée Lauder Companies General Management Program, January 28, 2007
- "Creative Thinking and Action," Toyota Executive Development Program, September 26, 2006.
- "Advances in Innovation Management and New Product Innovation," LINKS @ Wharton, August 26, 2006.
- "Advances in Innovation Management and New Product Innovation," Quad-C Executive Session, July 10, 2006.
- "A View from the Top: The Perspective of the Enlightened CEO," Wharton Executive Leadership Program for AICPCU, April 2005.
- "Challenging Your Industry's Mental Models," KPMG Global Insurance Institute, December 2003 and November 2004.
- "Market-Driven Organization," AICPCU and IIA Advanced Executive Education, Wharton, September 10, 2003.
- Strategy Discussion with Telenet's Top Management, March 11, 2003.
- "Organizational Change: Problems, Progress, and Prospect," Price-Waterhouse-Coopers Strategy Master Class, July 26, 2002.



- "Capturing Business Opportunities in a Changing World," SIA Institute, 50<sup>th</sup> Anniversary Program, March 2002.
- "Marketing Driven Strategies in a Global Economy," IBM's Managing Director Executive Development Program, February 2002.
- "Enhancing Creativity and Innovation," The Wharton e-Fellows I Program, March 2001.
- "World Class Marketing: Implications for Spencer Stuart," The Wharton/Spencer Stuart Leadership Assessment Program, June 2000.
- "Preparing for Leadership in the Changing e-Business Environment," CEO Circle, May 2000.
- "Innovation and Change in the Turbo-Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and the Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, May 2000.
- Winning in the Next Millennium, "Driving Change," 1998.
- Stennis Congressional Fellows Program at Wharton, "Driving Change: Creating Winning 21<sup>st</sup> Century Organizations," 1997.
- Competitive Marketing Strategies, "Preemptive Strategies," 1997, 1998.
- Sales Force Management Program, "Segmentation and Positioning for Sales Force Effectiveness," 1987, 1990, 1997.
- Healthcare Marketing and Communications, 1996.
- Re Engineering Pharmaceutical Marketing, 1994.
- Executive Development 1992, 1993.
- AMP – Advanced Management Program, 1988, 1989, 1990, 1991, 1997, 1998.
- "Marketing Strategy" in the J&J-Wharton Fellows Program in Management for Nurses, 1983, 1984, 1985, 1986.
- "Marketing Strategy" in the Delaware Valley Hospital Strategic Planning Program, May 1980.
- "New Developments in Social Research," in the Symposium on Corporate Awareness, February 1977.

**Speaker at various local and regional meetings** of the American Marketing Association, 1967 to present, and national meetings of other marketing associations such as the National Account Marketing Association, 1973; the International Pharmaceutical Marketing Research Group, 1973; The National Association of Children's Hospitals and Related Institutions, 1976; American Management Association's advanced Marketing Research Seminars, 1967/1968; and the Marketing Science Institute conferences and management seminars, 1968-1994.

**Guest speaker at special seminars:**

- The Australia and New Zealand Marketing Societies in Sydney and Melbourne, June 1977.
- Various conferences of the Israel Advertisers' Association, The Technion Research and Development Foundation, Ltd., The Ministry of commerce and Industry, 1968/1969.
- Foreign market entry and import protection strategies, The Israel Institute of Management, October 1984.

**Illustrative Presentations**

- "Online Panels: Where We Are Today and Where We Are Headed in the Future," CASRO, June 22, 2007.
- "The Creative Economy," Art and Culture at Penn and in Philadelphia, Penn Arts Leadership Conference, May 9, 2007.
- "The Challenge of Managing Creativity," The Biological Basis of Creativity: Defense Sciences Office Workshop, April 17-18, 2007.
- "Brand Names and Logos: Implications to Language Instruction," Penn's Language Faculty, March 22, 2007.
- "The Future of Management Education," International Academy of Management @ IMD, March 22, 2007.
- "Innovation Strategies for Profitable Growth," Wharton Fellows Philadelphia Master Class *Managing in an Evolving World*, February 27, 2007.

- "Web 2.0 & Social Networking: Implications for Management," The Worldwide J&J Diabetes Franchise Leadership Team, January 3, 2007.
- "The Future of the Corporation: Vision, Objectives, Strategy, Architecture, and Governance," SEI Center Board Meeting, November 17, 2006.
- "Should the Alumni Leadership Challenge their Mental Models?," Alumni Leadership Conference, October 14, 2006.
- "Perspectives on Research: Innovation, Impact, and Fun," The Joseph Wharton Scholars Senior Research Seminar, October 11, 2006.
- "Reinventing the MBA," Panelist at the MBA Roundtable Session on MBA 2020: Curricular Innovation for Tomorrow's Business School," October 6, 2006.
- "Customer Value: Strategies for the Long Term," Marketing Precision Conference: The Value of Marketing, September 27, 2006.
- "Does Korean Marketing Need Reform?" Korean Marketing Club, Seoul, June 5, 2006.
- "Redefining Marketing for the 21<sup>st</sup> Century," Wharton Club of Korea, Seoul, June 3, 2006.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "The Changing Nature of Corporations: Competing in a Flat World," organizer and chair of a panel at the Milken Institute Global Conference, April 2006.
- "Brand Names and Logos," Penn Humanities Forum on Word and Image, February 2006.
- "New Frontiers in the Practice of Management" with Paul Kleindorfer, CEO Workshops at IDC Israel, February 2006.
- "Strategic Trends on the Global Marketplace," The Sixth Herzliya Conference on the Balance of Israel's National Security, January 2006.
- "Creativity – A Must for Marketing Success," back-to-class session at the 2005 Wharton Marketing Conference, October 2005.
- "Decision Aiding Technologies and the New Theory of the Firm," with Paul Kleindorfer, Mack Center for Technological Innovation Conference on Using Technology to Improve Decision Making, May 27, 2005.
- The Silver Lining: Seeing Opportunities in Risk," Recent Advances in Operations and Risk Management Conference in Honor of Paul Kleindorfer, May 2005.
- "Effective Marketing Planning: What It Is and How to Produce It," JCCA Conference, April 2005.
- "Strategic Shifts and the Balance of National Security: Summation," J. K. Herzliya Conference, Israel, December 2004.
- "Return on Marketing Investment: Progress, Problems and Prospects," Address to the CMO Group of the conference board, October 6, 2004.
- "Challenges of Identifying, Developing, and Capturing Opportunities: A Fresh Look at Marketing," SEI Center Board Meeting, October 1, 2004.
- "Thought Leadership Survey Results," Presentation to WSP Editorial Board, October 2004.
- "Challenging the Mental Models of Marketing," A State of Marketing Symposium, Does Marketing Need Reform? Boston, August 9, 2004.
- "Growth Strategies and New Mental Models," Wharton Fellows, August 2003.
- "The Interdisciplinary Challenge of Marketing," Ph.D. Proseminar, February 2003.
- "Business and the Coming War on Iraq," Webcast with Wharton Fellows, February 2003.
- "Convergence Marketing: Strategies for Reaching the New Hybrid Consumers," a Webcast of the University of Wisconsin Consortium for Global e-commerce, January 2003 and a Soundview Teleconference, May 2003.
- "Managing the Complexities of the Convergent and Multi-Channel Marketing," CMO Summit, October 30, 2002.
- "Assessing Vulnerabilities," System Approaches to Terrorism Conference at George Washington University, July 15, 2002.
- "Marketing Driven Strategies for Today's Economy," presentation at Alumni Weekend, May 2002.
- "Pioneer and Late Entrants: Winning Strategies," Viagra, Cardura, Darifenacin WWT Meeting, April 9, 2002.
- "Wharton on the New Reality of Business: Insights from Our Experience," presentation with Robert Mittelstaedt to the Wharton Combined Boards, March 8, 2002.

- "The Interdisciplinary Challenge of Convergence Marketing," Wharton Ph.D. Proseminar, March 8, 2002.
- "Marketing Driven Strategies in a Global Economy," IBM's Managing Director's Executive Development Program, February 13, 2002.
- "Should You Have a Chief Marketing Officer?" January 2002.
- "Target Audience, Public Opinion and Foreign Policy – A Marketing Perspective," Balance of National Strength and Security – The Herzliya Conference, December 2001.
- "Capturing Opportunities and Developing New Mental Models," Wharton on the New Business Reality, December 2001.
- "Capturing Opportunities in the Post 9/11 Reality," The Wharton Club of Israel, December 2001.
- "Research Challenges in the Management of Extreme Events: The Case of the Office Homeland Security," with Paul Kleindorfer, Advisory Board Meeting of the Wharton Managing and Financing Extreme Event Project, December 2001.
- "The 5 Cs of Marketing: Capitalizing on the New Opportunities of Convergence Marketing," The Wharton Club-Atlanta, GA, November 2001.
- "Advances in Customer Focused Marketing and Business Strategy: The 5 Cs of Convergence Marketing," The International Academy of Management, Claremont Graduate University, November 2001.
- "Capturing Internet Opportunities Above the Low-Hanging Fruit," Business Week "Rethinking the Internet," Conference, Chicago, October 2001.
- "What Keeps Us Up At Night?: Post 9/11 Survey of US CEOs – Top Line Results," SEI Center Board, October 2001.
- "Disruptive Technology—Rethinking Your Mental Models," Forbes Global CEO Conference, Singapore, September 2001.
- "Making Strategy Happen: Problems, Progress and Proposed Actions for Winning in the Changing Global Information Age," Li & Fung Distribution Annual Conference, Hong Kong, July 2001.
- "Convergence Marketing: A New Marketing Strategy for the Global e-Business Environment," The Wharton European Forum, May 2001.
- "The e-Bus Challenge," the Top Executives of the Bank of East Asia, March 2001.
- "Globalization of Technology Startups," Wharton-Israel Global Alumni Conference on the Globalization of Technology Intensive Business-Panel 5, March 2001.
- "Global Business Strategy of a Technology Start Up," Wharton-Israel Global Alumni Conference, March 2001.
- "Developing a Strategy," ICA Board, March 2001.
- "e-Bus: The Curriculum and Research Challenge: A Discussion with Jerry Wind," Faculty Seminar, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- "Driving Change: New Business Models for the Global Digital Age," Opening Lecture of the PriceWaterhouse Coopers Management Consultants, e-Business Chair, Graduate School of Business Chair, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- "Reinventing Training for the Global Information Age," Delphi e-Learning Conference, January 2001.
- "The Impact of the e-Bus Revolution on the Marketing Discipline," Wharton Fellows in e-Business, The Impact on the Discipline, December 2000.
- "Whither System Thinking: Will Taking a Marketing Perspective be an Oxymoron?," Inaugural Conference of the Achoff Center for Advanced Systems Appraisal, September 2000.
- "New Marketing Rules for e-Business Success," UNIG, Singapore, August 2000.
- "New Marketing Rules for the Global Information Age," IBM Global Services Academic Conference, August 2000.
- "Creating an e-Business," Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- "Marketing Driven Business Strategy in the Global Information Age," Managing Change in the New Millennium, Wharton-Singapore Management University Conference, July 2000.

- "Digital Marketing: Towards a New Paradigm for the Global Information Age," Faculty Session-INSEAD, France, June 2000.
- "Innovation and Change in the Turbo—Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and The Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, Washington D.C., May 2000.
- "A New Marketing Paradigm for the Global e-Business Environment: A Catalyst for Bridging the Gaps," Building Bridges & Broadening Perspectives: A Paradigm for the Next Millennium, 29<sup>th</sup> EMAC Conference, Rotterdam, May 2000.
- "Preparing for Leadership in the Changing e-Business Environment," CEO Circle, May 2000.
- "Building Communities," Virtual Communities and the Internet, April 2000.
- "Valuation: Valuable or Value Less," Entering the Virtual Millennium, Wharton North American Regional Forum, April 2000.
- "The Future of the Marketing Organization," The Future of the Marketing Organization, MSI Board of Trustees Meeting, Cambridge, Massachusetts, April 2000.
- "Research Priorities in e-Commerce and Internet Marketing," Web Consortium, Pennsylvania State University's ISBM, March 2000.
- "Marketing Driven Business Strategy in the Global Information Age," Studio Ambrosetti's top executive seminar in Padova and Milan, March 2000.
- "Customization Strategies for Financial Services in the Global Information Age," the Citigroup and Simon Graduate School conference on Electronic Banking Commerce, New York. February 17-18, 2000.
- "Emerging Trends in the Pharmaceutical Industry and the Expected Scenarios," Innovative Managed Care Contracting, January 2000.
- "Marketing Science: Accomplishments and Challenges in the Global Information Age," Informs, November 1999.
- "Towards a Research Agenda in E-Commerce and Internet Marketing," AMA Educators' Conference, San Francisco, August 1999.
- "Creativity and Innovation," in Wharton Workshop on Creativity and Knowledge Creation, April 1999.
- "Innovation Strategy," New Product Development and Launch, April 1999.
- "Marketing Strategy in the Global Information Age: Implications for Research and Modeling," PhD. And Faculty Seminar IESE Universidad de Navarra, Barcelona, March 8, 1999.
- "Marketing Research in the Global Information Age: Practice, Problems, and Prospects," Wharton-IDC Marketing Communications Program, March 1999.
- "Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective," Wharton Impact Conference, March 1999.
- "Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective," Wharton Impact Conference, March 1999.
- "A Marketing Perspective on Communitarian Policies," The Communitarian Summit, Washington, D.C., February 28, 1999.
- "The Information Revolution and the Emerging Management Education Paradigm," On Line Educa, Berlin, December 1998.
- "Towards a New Management Education Paradigm," IDC Faculty Workshop, June 1998.
- "An Extended Marketing Perspective on Corporate Architecture for the 21<sup>st</sup> Century," Japan Marketing Association, World Marketing Conference, Tokyo, April 1998.
- "Winning the high Tech Wars: Strategies for Driving Change," NEC Management Team, Tokyo, April 1998.
- "The Challenge of Customer-Driven Product and Service Customization," Senior management of Convatec, March 1998.
- "Towards a New Marketing Paradigm," AMA Winter Marketing Educators=Conference, February 1998.
- "Positioning and Segmentation in the Global Information Age," IMS Marketing Management Meeting, January 1998.
- "The Challenge of Market Leadership," Bristol-Myers Squibb Medical Devices Group, January 1998.



- "Driving Change: Preparing for the 21<sup>st</sup> Century," Business Writers=Seminar, December 1997.
- "Marketing Strategy in the Global Information Age," AMP Program, October 1997.
- "Integration of Marketing and other Business Functions: The Wharton Experience," AMA: 1997 Faculty Consortium B Chicago, August 1997.
- "Positioning and Segmentation Opportunities for Synergy and Growth," Cognizant Group's Marketing Council, July 1997.
- "Preemptive Strategies," Wharton Executive Education Competitive Marketing Strategies, June 1997.
- "Creative Joint Ventures and the Potential Role of the University," Philadelphia-Israeli Chamber of Commerce, June 1997.
- "Communicating and Marketing Your Excellence," Volunteer Committees of Art Museums - VCAM Conference, Philadelphia, April 1997.
- "The Challenge of Information Technology to Marketing and Retailing in the 21st Century," University of Tokyo, April 1997.
- "Toward a New Corporate Governance Model: Lessons from the Japanese and U.S. Experience," With Masaru Yoshitomi, the Corporate Governance Workshop, March 1997.
- "Creating a Leading Global Medical Communication Company for the 21st Century," Medicus Group International, Inc., March 1997.
- "Segmentation and Positioning for Sales Force Effectiveness," Sales Force Management, Wharton Executive Education, March 1997.
- "Marketing Strategy in the Global Information Age: Implications for Modeling and Research," Ph.D. Proseminar, March 1997.
- "Choices and Strategies for Universities in the Global Information Age," Provosts Seminar on Information, February 1997.
- "The Use of Conjoint Analysis-Based Survey to Determine Consumer Price Elasticities," Debriefing Session for the Anti-Trust Division, Washington, D.C., February 1997.
- "The Challenge of Competitive Strategies in the Global Information Age," The Interdisciplinary Center for the Study of Business, Law and Technology, Herzliya, Israel, December 1996.
- "Innovation and New Product Development," Tutorial at the 2nd International Workshop, Santiago, Chile, October 1996.
- "Creating a 21st Century Enterprise," Universidad Adolfo Ibanez, Vina del Mar, Chile, October 1996.
- "Marketing: The State of the Art," Conference of the 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
- "The Technology Challenges for Family Business," Technology Day: The Web, The Future and You, the 1996 Family Firm Institute Conference, October 1996.
- "Innovative New Product and Service Development: Best Practice and Opportunities for Experimentation," The Israel-North America Business Conference, New York, October 1996.
- "Creating a 21st Century Enterprise: Implications for Boards of Directors," Enhance Board of Directors, September 1996.
- "Innovation in New Product Development: Best Practice in Research, Modeling and Applications," Presentation to the JMR Editorial Board on the Special issue, August 1996.
- "Marketing Strategy in the Global Information Age: Implications for Research and Modeling," AMA 1996 Doctoral Consortium, July 1996.
- "Creativity and Innovation: The Management Edge in the Technological Age," the First Wind Lecture at the Interdisciplinary University of Law, Management and Technology (ISRAEL), May 1996.
- "Address on Issues in Marketing Research for Legal Cases: Necessity of Using controls and the Propriety and Risk of Repetitive Probes," Marketing and Public Policy Conference, Washington, D.C., May 1996.
- "Innovation and New Product and Business Development," CEO Circle, May 10, 1996.
- "Segmentation in the Global Information Age: Accomplishments, Problems and Challenges," The 1996 Converse Award Presentation, May 7, 1996.
- "Advances in Marketing," Janssen Pharmaceutica, April 18, 1996.

- "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," Keynote Address, Healthcare Marketing and Communications Council and Wharton Executive Education, Wharton School, April 8, 1996.
- "The Stakeholder Challenge for Increased European Competitiveness," Wharton European Forum, (London, England), March 29, 1996.
- "Product Launch," Software Development and Marketing for Competitive Advantage, IC<sup>2</sup>, The University of Texas Conference, March 20, 1996.
- "The Next Enterprise: Creating a Successful 21st Century Enterprise Today," The Hong Kong Management Association, January 12, 1996.
- "Toward Virtual Management Education," International Academy of Management (Boston, MA), December 8, 1995.
- "Business in the Global Information Age," The Interdisciplinary Center of Business, Law and Technology, December 3, 1995.
- "Marketing Issue in the Global Economy," Wharton Doctoral Consortium, August 11, 1995.
- "A View of Marketing Through the Prism of the 1977 and 1995 Doctoral Consortia," Wharton School, Doctoral Consortium, August 8, 1995.
- "Toward a New Marketing Paradigm," Ambrosetti Group's A.F. Meeting (Rome, Italy), March 8, 1995.
- "Toward a New Marketing Paradigm: Lessons From and Implications to the Marketing of Services," Ambrosetti Group's Chief Executive Seminar (Milan, Italy), March 7, 1995.
- "The Value of Marketing Program," Janssen Pharmaceutica, January 9, 1995.
- "The Virtual University: Research and Action Agenda," The Virtual University Conference, SEI Center, January 12, 1995.
- "Marketing 2000," AIMSE/Wharton Investment Institute, January 13, 1995.
- "Beyond Brand Management," Wharton MBA Marketing Club, January 23, 1995.
- "A New Management Paradigm for the 21st Century Enterprise," Conference of the International Academy of Management, December 9, 1994.
- "Research Priorities in Marketing as Derived From the SEI Center for Advanced Studies in Management Work on Creating Successful 21st Century Enterprises," Doctoral Proseminar, November 16, 1994.
- "Creating a Successful 21st Century Enterprise: Implications for Business and Marketing Theory, Practice, Research and Education," The University of Tokyo, November 4, 1994.
- "State of the World: Trades, Problems and Prospects," YPO Philadelphia Chapter University, The Cloister, September 1994.
- "Is Your Marketing Obsolete? Implications of the New Marketing Paradigm for Business and Non-profit Organizations," YPO Philadelphia Chapter University, The Cloister, September 1994.
- "The Value of Marketing: A Research Agenda," Value of Marketing Conference, Stanford University, August 9, 1994.
- "Electronic Commerce: Progress and Prospects," AMA Conference, San Francisco, August 8, 1994.
- "Determining the Value of Marketing: A New Challenge to the Discipline," San Francisco AMA Conference, August 8, 1994.
- "JMR Special Issue on Innovation in New Product Development: Best Practice in Research, Modeling and Applications," JMR Editorial Board Meeting, San Francisco, August 7, 1994.
- "Entering the U.S. Consumer Durable Markets," Nijenrode Executive MBA Program, August 4, 1994.
- "A New Approach for Estimating the Demand for Interactive TV Products and Services, Interactive Industry 2000: Market Research for the Interactive Television Business," July 28-29, 1994.
- "Creating a 21st Century Enterprise," Poon Kam Kai Institute of Management, The University of Hong Kong, June 16, 1994.
- "Advances in U.S. Marketing and Their Implications to China," Joint faculty seminar of the School of Economics and Management, Tsinghua University and the School of Management, Peking University, June 15, 1994.

- "Toward a New Marketing Paradigm," a faculty seminar at the Hong Kong University of Science and Technology, School of Business and Management, June 14, 1994.
- "Empirical Generalizations in Marketing: Opportunities for MSI Research Program," MSI Board of Trustees Meeting, April 29, 1994.
- "Textbook of the Future: A Perspective From the Virtual University Lab," April 8, 1994.
- "The Impact of Marketing Science on Industry and Academia," The Oscar W. Neuhaus Lecture, Rice University, March 23, 1994.
- "The Challenge of a New Marketing Paradigm," University of Texas at Austin, March 23, 1994.
- "Market Driven Quality," at the Beyond Quality: Organizational Transformation to the 21st Century Enterprise, March 17-18, 1994.
- "The Marketing Challenges for the Philadelphia Orchestra," Presentation to the Board of Trustees of the Philadelphia Orchestra, March 1, 1994.
- "Pharmaceutical Marketing: Emerging Challenges and Opportunities," Pharmaceutical Advertising Council and Wharton Executive Education Conference on Reengineering Pharmaceutical Marketing, February 25, 1994.
- "Role of Marketing in the New MBA Curriculum: Lessons from the Wharton Experience," AMA Winter Conference, February 21, 1994.
- "Empirical Generalizations in Marketing: Some Observations," Wharton Conference on Empirical Generalizations in Marketing, February 16-18, 1994.
- "Increasing Marketing Effectiveness," Executive Conference of Schering-Plough Int., January 18, 1994.
- "The Value of Pharmaceutical Advertising and Promotion," Coalition of Healthcare Communication Conference, Marketing Conference in an Era of Change, New York October 27, 1993.
- "Advances in Marketing Strategies," Nijenrode University Executive Program, August 6, 1993.
- "Global Consumer Brand Strategies: Problems and Prospects," Seminar for the Business Partners of the Norwegian School of Management, June 11, 1993.
- "Determinants of New Product Success: Lessons from the U.S. and Japan," Faculty and Ph.D. students seminar at Erasmus University, June 10, 1993.
- "Getting the Most out of Benchmarking," Board of Directors of Wharton's Alumni Association, May 14, 1993.
- "Determinants of Successful Entry to the U.S. Market," Wharton-Recanati Program, May 12, 1993.
- "Marketing Opportunities in Japan and East Asia," with Hotaka Katahira and the International Forum Participants, April 18, 1993.
- "Toward a New Marketing Paradigm: Implications for Marketing Departments," Advisory Board Meeting of the Wharton's Marketing Department, April 8, 1993.
- "The New Wharton MBA Curriculum," Faculty seminar at Erasmus University, March 10 and June 10, 1993.
- "Marketing Science at a Crossroad," Inaugural Presentation as the first holder of the Unilever-Erasmus Marketing Professorship, Erasmus University, February 18, 1993.
- "The Strategic Impact of Market Driven Quality," with Paul R. Kleindorfer. ORSA/TIMS, San Francisco, Session on Customer Satisfaction and its Role in Global Competition. November 1992.
- "Issues and Advances in New Product Development and Management: A U.S. Perspective," Advanced Industrial Marketing Strategy Seminar, September 18, 1992.
- "The Market Driven 21st Century Enterprise: Implications for Law Departments," Presentation at the SmithKline Beecham U.S. Law Department Conference on Customer Focus Continuous Improvement, April 28, 1992.
- "New Product Development: Problems, Advances and Prospects," Wharton's Advanced Industrial Marketing Strategy, March 19, 1992.
- "Preparing for the 21st Century Today," Securities Industry Institute, 40th Anniversary Program, March 1992.



- "The Successful 21st Century Enterprise as Customer Driven: Implications for Marketing and Management Science," University of Texas at Austin, Faculty Colloquium, February 1992.
- "Time Based Competition: Implications for Marketing Science," INSEAD Faculty Presentation, January 1992.
- "A New Management Paradigm for Israel's Schools of Management: Lessons from the New Wharton MBA Curriculum," Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.
- "Designing & Implementing an Innovative MBA Program: Lessons from the Wharton Experience," Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.
- "How to Develop Products More Often and Get Them to Market Faster: Guidelines for Functional Management," Ambrosetti Group, Milan, Italy, May 9-10, 1991.
- "Management in the 21st Century: Implications to the Fragrance Industry," Summit 2000 Conference of the Fragrance Association, April 8, 1991.
- "Marketing Research and Modeling for the 21st Century Enterprise: The Emerging Crisis and its Challenges," Management Science Roundtable, February 17, 1991, Redington Beach, FL.
- "Inducing Creativity and Innovation in Large Bureaucracies: Lessons from Marketing," RGK 4th International Conference on Creativity and Innovative Management, August 8-10, 1991, Los Angeles, CA.
- "Concept Testing for Generating and Evaluating Positioning Strategies," PDMA Positioning Conference, March 6, 1990, New York, NY.
- "Research Priorities in the Information Technology Area," MSI, Information Technology Steering Group, January 18, 1990.
- "Building the 21st Century Corporation Today: A Marketing Perspective," MASTERSHIP, January 9, 1990, Los Angeles, CA.
- "Globalization: Opportunities for Innovative Research and Modeling," UCLA, January 9, 1990, Los Angeles, CA.
- "Marketing Skills and Strategies for the 1990's," Pfizer International Marketing Managers, December 1989, Lambertville, NJ.
- "Increasing the Effectiveness of Your New Product Development," Indian Institute of Technology, November 1989, Bombay, India.
- "Competitive Advantage Through Strategic Marketing," Contel Corporation, October 1989, Lake of the Ozarks, MO.
- "Management in the 21st Century," Wharton Advanced Management Program, September 1989, Philadelphia, PA.
- "The Contributions of Strategy and Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Marketing Educators Conference, Chicago, August 1989.
- "The Current and Potential Contributions of Strategy and the Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Summer Conference, August, 1989, Chicago, IL.
- "Selecting and Negotiating International Strategic Alliances: Applications of the AHP," TIMS Osaka, July 1989.
- "Improving the Effectiveness of the Industrial New Product Development Process: Lessons from Industry – The AS 400 Case," 16th International Research Seminar in Marketing, La Londe les Maures, France, May 19, 1989.
- "Strategic Marketing," Studio Ambrosetti AP Milan Group, May 17, 1989.
- "Developing and Launching New Products: Costs, Risks, and Conditions for Success," Studio Ambrosetti, AF Marketing Group, May 16, 1989.
- "The Marketing Challenge for Top Management: Promises and Pitfalls of Expert Systems," University of California, Irvine, April 27, 1989.
- "Management in the 21st Century: Implications for Management Research and Education," University of California, Irvine, April 27, 1989.
- "The Globalization of Management Education: Options, Trade-Offs, and an Agenda for Implementation," AACSB Annual Meeting, April 18, 1989, Montreal.



- "A Contrarian Approach to Effective Pricing," The Pricing Institute, March 7, 1989, New York.
- "Achieving Competitive Advantage in Marketing," Securities Industry Association, March 6, 1989, Philadelphia, PA.
- "Courtyard by Marriott: Designing a Hotel Facility with Consumer Based Marketing Models," presented to the TIMS/AMA seminar Marketing Science: A Developmental Tool for Management Scientists, New York, November 16, 1988.
- "Technology and Marketing-Driven Global Portfolio of R&D Projects," with Robert DeLuccia presented at the ORSA/TIMS Joint National Meeting in Denver, Co, October 26, 1988.
- "Pitfalls and Challenges of Global Marketing," Second International Conference on Marketing and Development, Karl Marx University, Budapest, Hungary, July 12, 1988.
- "Information Technology and Marketing Strategy," with Eric Clemons, presented at IS, TC and Strategy Plenary Meeting, January 1988.
- "A New Challenge for Human Resource Management: Incorporating a Marketing Perspective," The Lauder Institute: International Human Resource Conference, December 1987.
- "Advances in Marketing Strategy and Research," Wharton Alumni Club, Milan, October 1987.
- "Marketing and Corporate Strategy," Studio Ambrosetti, Milan, October 1987.
- "Marketing for Financial Institutions," Studio Ambrosetti, Milan, October 1987.
- "Proactive Marketing Research and Modeling: Pitfalls and Prospects," PMRG Fall 1987 meeting, Captiva Island, Florida, October 1987.
- "Turning Salespeople and Non-Marketing Executives into Marketing Strategists," AMA Marketing Educators' Conference, Toronto, August 1987.
- "International Marketing," Wharton Alumni Club, Toronto, August 1987.
- "Marketing and Technology: Progress, Problems, and Prospects," European-American Symposium, Enschede, The Netherlands, June 29-July 1, 1987.
- "Second Generation Expert Systems: Incorporating Enhanced Explanation and Learning," Marketing Science Conference, Jouy-en-Josas, France, June 24-26, 1987.
- "Market Segmentation: Shortcomings and Opportunities," 1987 Attitude Research Conference, West Palm Beach, Florida, May 1987.
- "Advances in Marketing Research and Modeling," Studio Ambrosetti, Milan, December 1986.
- "Advances in Management Strategy: A Marketing Perspective," The Institute of Management Consultants, March 1986.
- "The Marketplace of the Future: Global Consumers," Advertising Research Foundation 50th Anniversary Conference, March 1986.
- "A Marketing Perspective for Public Management: Research Implications," Wharton Department of Public Policy and Management Brown Bag Seminar, January 1986.
- "Advances in Global Marketing Strategy: Concepts, Methods, and Applications," International Symposium on Recent Developments in Management Research, Helsinki, Finland, 1986.
- "Expert Systems in Marketing," TIMS October 1986 Conference, Miami.
- "Advances in Portfolio Analysis and Strategy," Chinese Management Association, Taipei, July 1985.
- "New Development in Marketing and Planning," WEFA/Lauder Seminar, June 1985, Tokyo, Japan. Sessions on Advances in Market Segmentation, Product Positioning and Portfolio Analysis and Strategy.
- "Advances in Portfolio Analysis and Strategy," University of Illinois, Theories of Marketing Practice Conference, May 1985
- "Micro Computers in Marketing," Marketing Science Conference, March 1985.
- "Global Marketing Strategies," New York University, 1985.
- "Diffusion Models: The State of the Art," ASA conference, 1984.
- "Management Education in a Global Context," University of Pennsylvania Conference on Management Education and Foreign Languages, December 1984;
- "Generating and Evaluating Industrial Marketing Strategies Using the AHP," TIMS Conference, November 1984;
- A Innovation Diffusion and New Product Forecasting," TIMS Conference, November 1984;

- "Foreign Market Entry and Import Protection Strategies," Israel Institute of Management, October 1984.
- "The Contribution of Consulting to the Consumer Research Discipline," ACR conference, October 1984.
- "The CEO and the Board," Strategic Management Conference, October 1984.

## PROFESSIONAL AFFILIATIONS AND AWARDS

### Professional Affiliations

1. Fellow of the International Academy of Management (since 1989), Chancellor 2000- , Vice Chancellor for the Americas, 1996-2000
2. Academy of International Business
3. American Marketing Associations
4. American Association for Public Opinion Research
5. American Psychological Association, Division of Consumer Psychology (Div. 23)
6. Association for Consumer Research
7. International Communication Association
8. Product Development and Management Association
9. Psychometric Society
10. Strategic Management Society
11. INFORMS – The Institute of Management Sciences
12. The Market Research Society (London)

### Professional Awards

#### 1. Honorary Degrees

M.A. Honors, University of Pennsylvania, 1971

#### 2. Awards

- **Buck Weaver Award**, Massachusetts Institute of Technology, 2007.
- **Honorary Fellow of the Decade**, Interdisciplinary Center, Herzliya (Israel), May 2004.
- The 2003 **Elsevier Science Distinguished Scholar Award** of the Society for Marketing Advances
- One of the **10 Grand Auteurs** in Marketing. [Alain Jolbert, EMS Management and Societe, 2000]
- One of 18 *JAR* articles in the Special Classics Issue of **articles that have withstood the test of time**. Nov./Dec. 2000.
- **The Paul D. Converse Award, 1996.**
- **American Marketing Association/Irwin Distinguished Educator Award, 1993.**
- **First Faculty Impact Award**, Wharton Alumni Association, 1993.
- First Runner-Up in the 1988 **Franz Edelman Award for Management Science/Achievement.**
- **The 1985 Charles Coolidge Parlin Award.**
- Elected as the 1984 member of the **Attitude Research Hall of Fame.**
- Delivered the 13th (1981) **Albert Wesley Frey Lecture**, University of Pittsburgh.
- My *Product Policy* book won the **1979 Book of the Year Award** given by the editors of *Expansion* (Mexico).
- Winner of two **Alpha Kappa Psi Foundation Awards** for the best article published in the *Journal of Marketing* in 1973 and 1976.
- Runner up of the 1983 **William O'Dell Award** for "the article published 5 years earlier in JMR which stood the test of time and made the most significant long run contribution to Marketing Theory, methodology and practice".
- **Winning paper** (with Paul E. Green) of American Psychological Association Division of Consumer Psychology, 1972 Research Design Competition.
- A finalist (top 5) for the 1980 Wharton Award for teaching excellence.

#### 3. Illustrative Citations

- Third highest ranked Marketing Scholar in the University of Maryland's Kirkpatrick and Locke Faculty Scholarship Study, 1985 (based on number of publications, citations, and peer ratings).
- 10th highest ranked marketing Scholar in the Cote, Leong and Cote "Assessing the Dissemination and Utilization of Marketing Research in the Social Sciences: A Citation Analysis Approach," 1990.

#### 4. Research Grants

- National Science Foundation: U.P. Research Grant (Summer 1970);
- General Foods, the Jell-O Division (1971);
- N.W. Ayer (1972) - (with Paul E. Green);
- Downe Communication, Inc. (1972);
- Lever Brothers (1972) - (with Paul E. Green);
- Thomas Jefferson University Hospital (1973);
- AT&T (1973);
- The Robert Wood Johnson Foundation Clinical Scholar Fund (1974);
- The John and Mary R. Markle Foundation with R.E. Frank (1975-1976);
- National Science Foundation (Grant No. 51575-12928) (1975);
- The National Health Care Management Center of the Leonard Davis Institute with Thomas Robertson (1977).

#### 5. Fellowships

- Hebrew University Awards 1959/1960; 1964/1965; 1965/1966;
- Ford Foundation Fellowship 1963/1964;
- Owen D. Young: General Electric Fellowship in Marketing 1964/1965; 1965/1966;
- Bankendorf Fellowship 1964/1965;
- Stanford University Fellowship 1964/1965; 1965/1966.

#### 6. Illustrative Recent Media Coverage

- Knowledge@Wharton:
  - Will a New Theory Help Firms to Manage in a 'Flat' World? [October 25, 2006]
  - Farewell, Peter Drucker: A Tribute to an Intellectual Giant [November 16, 2005]
  - Should Your Next CEO Be a Philosopher? [interview, February 9, 2005]
  - What's the Buzz About Buzz Marketing? [interview, January 12, 2005], reprinted in *Wharton Alumni Magazine*, Winter 2005
  - Amazon's Multiple Personalities [interview, January 14, 2005]
  - Back to the Drawing Board: Is the Traditional Theory of the Firm Obsolete? [interview, October 6, 2004]
  - The Power of Impossible Thinking [book, August 25, 2004]
  - What's Behind the 4-Minute Mile, Starbucks, and Moonlanding? The Power of Impossible Thinking [book, July 14, 2004]
  - A Lofty Take on Leadership: Mountain Climbing and Managing Companies [book, September 24, 2003]
  - How Business Can Prepare for War [conference, February 9, 2003]
  - Could a Cyber-Terrorist Take Down Your Company? Don't Wait to Find Out [conference, August 28, 2002]
  - The New Business Reality [conference, January 30, 2002]
  - What Webvan Could Have Learned from Tesco [interview, October 10, 2001]
  - What's in Store for Capital Markets and the Economy? [interview, September 26, 2001]
  - Did Terrorists Blow Up the Recovery? [interview, September 13, 2001]
  - Dotcom Bomb Hits the Publications that Covered It [interview, August 29, 2001]
  - Can Priceline Remain Profitable? [interview, August 15, 2001]
  - Good vs. Great Leaders: The Difference is Humility, Doubt, and Drive [conference, June 20, 2001]
  - It's Not Easy Being Paul Green [interview, November 8, 2000]
  - Three Marketing Lessons from the Love Bug [interview, May 24, 2000]
  - Just-in-Time Education: Learning in the Global Information Age [paper, August 30, 2000]
  - New Rules of Digital Marketing [interview, October 13, 1999]
  - Who's Buying on the Internet? [paper, September 1, 1999]
  - Who Is Buying on the Internet? [paper, November 4, 1999]
  - Marketing Strategy in the Global Information Age [lecture, July 23, 1999]
  - The Knowledge Edge [conference, June 23, 1999]



- Goh, Dr. Sunny T.H. "How to Make the Impossible Possible." *The Star Online*. July 10, 2006. [thestar.com.my/news/story.asp?file=/2006/7/10/business/14512212&sec=business](http://thestar.com.my/news/story.asp?file=/2006/7/10/business/14512212&sec=business).
- A link has been placed for the book *The Power of Impossible Thinking* on the website, [www.worksavvy.ws/organization.htm#yourself](http://www.worksavvy.ws/organization.htm#yourself) as a recommendation to entrepreneurs and the diagram from page xxiv of the book is shown in the section of the website, "Organizing Yourself: Your Mind, Your Attitude, Time and Planning."
- "How Business Ideas are Born," MoneyControl.com, June 2, 2006.
- "Think You Know More Than Your Boss? You Just Might," Beepcentral.com, April 24, 2006.
- "New Model: Divide and Govern." *Directorship*. April 2006.
- "Creativity Comes to B-Schools," *Business Week Online*, March 26, 2006.
- Thomas Group Review. *The Power of Impossible Thinking: A conversation with Yoram (Jerry) Wind and Jim Taylor*. Also appeared at Knowledge Leadership @ Thomas Group, Winter 2006.
- *The Power of Impossible Thinking* selected as one of the five outstanding books on "Thinking Outside the Box" by the Swiss Journal CASH on March 16, 2006.
- "Marketing Prof. Gives Crash Course in Brand Image," *Daily Pennsylvanian*, February 9, 2006.
- "Churning Out Books for the Bigwigs," *Daily Pennsylvanian*, November 10, 2005.
- Inaugural Thought Leader interview, *The Brand Strategy Roundtable Journal*, November 2005.
- A number of radio interviews re *The Power of Impossible Thinking*, including:
  - *Something You Should Know with Mike Camuthers*, March 2006.
  - Mix 92.9 Morning Show, Nashville, March 2006.
  - KRMB Radio, Strategies for Living, Shreveport, LA, August 11, 2004.
  - WKCT Radio, Drive Time, Bowling Green, KY, August 20, 2004.
  - WABJ Radio, John Sabastian Morning Show, Detroit, MI, August 18, 2004.
  - WKNO Radio, Smart Copy, Memphis, TN, August 17, 2004.
  - KIKK Radio, Salt Lake City, UT, November 6, 2004.
- "Winds of Change," *The Economic Times*, *Brand Equity*, June 1, 2005, front page.
- "From Ink to Implementation: New Press Wharton School Publishing Co-Editors Say They Aim for Sound Management Titles that You Can Do Something With," *BusinessWeek Online*, April 11, 2005.
- "Power of Mental Models," *Asia Inc.* April 2005, pp. F14-15.
- "Challenge Your Mental Models," *The Edge Malaysia*, March 21, 2005.
- "Meet the Master-Minds: Jerry Wind Reveals the Power of Impossible Thinking," *Management Consulting News*, March 3, 2005.
- "Mental Power Tool," *Automotive Design and Production*, 2004.
- "Read All About It: Q&A with Jerry Wind about Wharton School Publishing," *Wharton Alumni Magazine*, Spring 2004.
- "Comment s'adresser au consommateur 'Post-bull'?" D'apres *Convergence Marketing Strategies for Reaching the Hybrid Consumer*, *Business Digest* 127 (February 2003), pp. 19-20.
- "Wealth is Created During Periods of Uncertainty," *Fast Company*, April 2002, pp. 87-88.
- "Thought Leaders: Convergence Marketing: Preview an excerpt from the book by Wharton Professor Jerry Wind and Professor Vijay Mahajan of the University of Texas," Wharton's E-Buzz, October 2001; and Knowledge@Wharton, October 2001.
- "Wind of Change," *The Peak*, Volume 17, Number 1, 2001.
- "Conversation with Jerry Wind," Singapore, October 2000; abstract reproduced in [http://can.mediacorpnews.com/analysis\\_prog/incon/incon\\_wind1.htm](http://can.mediacorpnews.com/analysis_prog/incon/incon_wind1.htm).
- "You Can't Be An Extremist," *Globs* March 8, 2001 (Hebrew).
- Wind, Yoram (Jerry). "Managing in the Year 2000" *Executive Issues*. August 1991.

## PERSONAL DATA

**Office:** The Wharton School  
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Philadelphia, PA 19104  
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E-mail: windj@wharton.upenn.edu

**Marital Status:** Married to Vardina Wind, Artist, (BA in Sociology, MA in Communications); Two children, 39 and 45.

### Illustrative Pro Bono Activities

The Philadelphia Museum of Art. Trustee (1992-); Member of the Corporate Executive board of the Museum (1996-); Led a trustee committee and the management and curatorial staff of the museum in the development of a market driven strategy, (1990); Member of the Nominating Committee (1999-2002); Member of Trustee Committees for Development (1993-1997); Special Exhibitions (1993-1995); and Strategy (1997-1998); Chairman, Audience Building Committee (2004-);

The Interdisciplinary Center, Herzliya (Israel), all planning activities and other involvement (as outlined on p. 43), since 1994.

American Friends of IDC – Founding President (1998-2002); Member (2003-).

National Constitution Center, Member, Strategic Planning Steering Committee (2005)

Business for Diplomatic Actions, Member, Advisory Board and Coordinator of the Wharton research efforts in this area (2005-)

Lauder Institute Alumni Association, Advisory Board (2005-)

Institute of Contemporary Art (ICA). Help guide a strategic planning process (2001).

University of Pennsylvania Museum of Archeology and Anthropology. Help establish a vision and revenue generation strategies (1999).

The Philadelphia Orchestra: Advisor regarding the development of Marketing Strategy (1994-1997).

The Jewish Federation of Greater Philadelphia: Member of the Financial Resource Development Committee, 1990-1992.

Operation Independence, Israeli Management School Oversight Committee, 1991-1992.

### Affiliations:

The Philadelphia Museum of Art – Trustee (Philadelphia)  
The Institute of Contemporary Art of the University of Pennsylvania (Philadelphia)  
Pennsylvania Academy of the Fine Arts (Philadelphia)  
The Museum of Modern Art (New York)  
American Craft Museum (New York)  
Whitney Museum of American Art (New York)  
The Jewish Museum (New York)  
Guggenheim Museum (New York)  
U.S. Holocaust Memorial Museum (Washington D.C.)